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COVER SUBJECT—Picturesque fishing schooners in the Nova Scotian port of Lunenburg, home of the *Bluenose* that achieved fame through her capture in successive years of the International Fishermen's Trophy. Vessels of this character are employed in fishing for cod on the Newfoundland Banks from March to September, and contribute substantially to Canada's foreign trade. Landings of cod between January and October, 1948, amounted to 221,957,000 pounds, compared with 191,992,000 in the same period last year. Exports of cod in the ten-month period this year amounted to 57,799,000 pounds, as compared with 45,314,000 pounds last year. Shipments consisted of fresh cod, fillets, boneless, green salted, dried salted and smoked cod. *National Film Board Photo.*

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Canadian Exports Continue Climb, Featured by Shipments to U.S.A.

Total to all countries for October highest since June, 1945—Cattle contributed most to overall advance for first ten months of current year—Decline in exports to Latin America, but Cuba, Mexico and Venezuela bought more goods from Canada.

CANADIAN domestic exports continue their climb, reaching a value for October of $307,000,000. This is the highest figure for any single month since June, 1945, when the value was $322,800,000 and the demand created by a war emergency for a wide variety of materials was being maintained at a high level. Shipments to the United States still feature the returns, exports to that country of $148,800,000 being exceeded only by the value for September, when the highest figure on record was achieved. Purchases by the United States for the first ten months of the current calendar year, amounting to $1,190 millions, already exceed the total for 1947 and come within a few millions of those for 1945. If the present level of exports to Canada's best customer is maintained, an all-time record will be established, surpassing even the figures for 1944. Shipments to Canada's second best customer, Great Britain, are slightly less than for the first ten months of 1947, the respective totals being $581,700,000 and $609,400,000.

Despite dollar shortages in many lands and the prevalence of import controls, statistical returns for the first ten months of 1948 indicate that Canadian exports were higher in value to seventeen countries than in the corresponding period of 1947 any difference of less than a million dollars between the two periods under review being disregarded. On the other hand, Canadian exports were lower in value to twenty-nine countries. It will be noted that funds made available through the Economic Co-operation Administration for recovery in Europe have contributed to some of the gains, but the number is small. Excluding the United States, increases in Canadian exports to the following countries are recorded: Newfoundland, South Africa, Singapore and Federation of Malaya, Hong Kong, Hawaii, Cuba, Mexico, Venezuela, Denmark, Finland, France, Germany, Greece, Switzerland, Japan and the Netherlands East Indies.

Excluding the United Kingdom, decreases in Canadian exports to the following countries are recorded for the first ten months of 1948, compared with the same period in 1947, again disregarding any difference of less than a million dollars: Eire, Malta, Barbados, Jamaica, Trinidad and Tobago, Leeward and Windward Islands, British Guiana, Southern Rhodesia, Nigeria, India and Pakistan, Ceylon, Palestine, Australia, New Zealand, Argentina, Colombia, Peru, Belgium, Netherlands, Norway, Poland, Soviet Union, Sweden, Yugoslavia, China, French Africa, French West Indies and Iraq.

Substantial Increase in Cattle Shipments

As a group of commodities, animals and animal products contributed most to the overall increase of exports for the first ten months of the current calendar year, headed by cattle. This item alone accounted for a total of $53,700,000, as against $12,100,000 in the corresponding period last year. Shipments were also higher of other living animals, fish and fishery products, bacon and hams, other meats, milk products other than cheese, and eggs.

Canada—Beef on the hoof in Western Canada, which is contributing substantially to the current inflow of United States dollars. Cattle exports during the month of October totalled 93,998, valued at $14,005,420, of which shipments to the United States totalled 93,164, valued at $13,834,688.

National Film Board Photo.

Non-ferrous metals follow next in line, headed by aluminum and aluminum-products. Shipments of copper and nickel also showed substantial advances. Among the forest products, newsprint, pulpwood and wood-pulp recorded gains of consequence. Lumber shipments during the period were also high, but the values for the two years under review were practically the same.

In the other commodity groups, increases are noted for wool products, rolling mill products, farm machinery and agricultural implements, asbestos, ships and aircraft.

Canadian Cattle Exports in October

	Total		Total to U.S.A.	
	No.	Value	No.	Value
Cattle—Purebred	2,849	$ 846,691	2,659	$ 764,866
Cattle—Dairy, 200-700 lbs.	23	1,742	23	1,742
Cattle—Dairy, over 700 lbs.	6,759	1,256,599	6,697	1,235,071
Cattle—Calves	3,178	104,420	3,172	104,365
Cattle—Beef, 200-700 lbs.	20,511	1,856,564	20,325	1,847,839
Cattle—Beef, over 700 lbs.	60,678	9,939,404	60,288	9,880,805
Total	93,998	$14,005,420	93,164	$13,834,688

Exports of fresh beef in October amounted to 192,036 cwts., valued at $6,143,398, shipments to the United States amounting to 189,180 cwts., valued at $6,021,527.

South Africa Issues New Marking Regulations for Woollen Goods

Both local and overseas manufacturers must comply in order to sell in this market—Object is to protect the consumer and to promote sale of woollen products.

By D. S. Armstrong, Assistant Commercial Secretary for Canada

JOHANNESBURG, November 15, 1948.—New marking regulations for woollen materials, effective September 1, 1949, have been promulgated by South Africa, the world's second largest wool producer. All manufacturers, both local and overseas, will have to comply with these regulations if they wish to sell their goods in this market. The object of this measure is to protect the consumer, and also to promote the sale of woollen products.

Manufacturers will be required to affix a stamp, tag or label to every garment or piece of fabric which contains 20 per cent or more, by weight, of wool fibre. The identification marking must indicate the percentage of wool content and the kinds of other fibres, if they comprise five per cent or more of the finished product. An acceptable marking, for example, would read: "Made of 60 per cent wool plus rayon".

A tolerance of plus or minus five per cent is allowed in stating the wool content, except in the case of a product sold as "All Wool" or "100 per cent Wool", where there is a minus tolerance of one per cent.

Regulations Not Applicable to Certain Items

The new regulations do not apply to: (*a*) Products which contain less than 20 per cent of wool fibre, provided such products are not described or sold as "Wool"; (*b*) any job lot where it is impossible or impracticable to mark the product with the required information; (*c*) footwear; (*d*) any pile fabric; (*e*) any semi-manufactured wool product which is intended to be further processed; (*f*) linings, interlinings, paddings, stiffening, trimmings and facings in articles of apparel which are wool products.

Further information concerning these regulations which may affect certain Canadian manufacturers can be obtained from the Commercial Relations and Foreign Tariffs Division, Department of Trade and Commerce, Ottawa.

Canadian Exports, by Areas

NOTE: Throughout this bulletin, totals represent sums of unrounded figures, hence may vary slightly from sums of rounded amounts.

GEOGRAPHIC AREAS	October			January-October		
	1938	1947	1948	1938	1947	1948
BRITISH COUNTRIES	(Millions of Dollars)					
United Kingdom and Europe	36·3	69·7	67·0	282·1	631·1	590·8
America	2·2	11·7	9·3	17·9	109·7	94·3
Africa	1·4	7·2	11·3	15·7	72·0	75·8
Asia	0·6	8·5	6·8	6·9	59·4	43·3
Oceania	3·8	7·4	3·3	41·4	77·8	41·1
TOTAL BRITISH COUNTRIES	44·4	104·5	97·9	364·0	950·0	845·3
FOREIGN COUNTRIES						
United States and Possessions	28·1	103·4	149·8	218·9	841·0	1,195·8
Latin America	1·7	8·9	11·2	14·6	103·2	99·3
Europe	9·8	26·8	38·0	60·5	286·5	260·6
Other Foreign	4·2	7·3	10·0	24·7	74·9	64·2
TOTAL FOREIGN COUNTRIES	43·8	146·3	209·1	318·7	1,305·7	1,619·8
TOTAL DOMESTIC EXPORTS	88·2	250·8	307·0	682·7	2,255·6	2,465·1

Canadian Exports, by Countries

Country	October			January-October		
	1938	1947	1948	1938	1947	1948
BRITISH COUNTRIES	(Thousands of Dollars)					
Europe:						
United Kingdom	36,045	66,776	65,573	278,404	609,403	581,729
Eire	163	2,335	820	3,333	16,124	6,504
Gibraltar	1	11	.....	6	245	6
Malta	61	535	654	346	5,330	2,610
TOTAL EUROPE	36,270	69,657	67,047	282,089	631,102	590,849
America:						
Newfoundland	935	5,861	4,448	6,536	41,792	44,560
Bermuda	134	412	373	1,124	4,200	3,363
Barbados	118	523	570	873	7,457	4,719
Jamaica	450	1,432	591	3,644	14,599	10,958
Trinidad and Tobago	323	1,740	1,797	2,901	22,830	14,325
Bahamas	129	226	250	1,481	2,759	3,116
Leeward and Windward Islands		545	622		6,195	5,131
British Honduras	25	116	138	235	1,229	977
British Guiana	107	881	552	1,131	8,668	7,169
Falkland Islands	.....	1	.....	.....	2	.....
TOTAL AMERICA	2,221	11,737	9,341	17,925	109,731	94,318
Africa:						
Northern Rhodesia	1,216	238	39	13,655	430	400
Union of South Africa		5,213	10,650		58,176	67,080
Other British South Africa		4	1		14	5
Southern Rhodesia	66	650	193	913	4,655	2,286
Gambia	2	1	1	17	58	26
Gold Coast	23	218	203	148	1,295	1,735
Nigeria	5	120	38	61	1,990	711
Sierra Leone	8	31	44	164	679	630
Other British West Africa	.....	.....	.....	.....	2	6
British Sudan	3	20	1	206	998	40
British East Africa	56	690	171	550	3,691	2,834
TOTAL AFRICA	1,379	7,185	11,341	15,714	71,988	75,753

Canadian Exports, by Countries—*Continued*

Country	October			January-October		
	1938	1947	1948	1938	1947	1948
British Countries—Con.	(Thousands of Dollars)					
Asia:						
India	262	5,312	2,579	2,328	37,582	20,987
Pakistan			327			1,725
Burma*	5	31	.....	113	701	.....
Ceylon	12	393	220	174	2,877	1,463
Aden	7	88	147	81	1,226	1,247
British Malaya	150	705	1,318	2,081	5,897	7,702
Other British East Indies	.....	.....	.....	5	9	16
Hong Kong	187	751	778	1,998	4,928	6,641
Palestine	26	1,202	1,455	132	6,150	3,472
Total Asia	649	8,482	6,824	6,912	59,370	43,253
Oceania:						
Australia	2,482	5,272	2,097	27,711	49,913	26,572
New Zealand	1,337	2,105	1,221	13,296	26,996	13,945
Fiji	22	25	.....	299	845	461
Other Oceania	1	4	.....	44	25	140
Total Oceania	3,842	7,406	3,318	41,350	77,779	41,118
Total British Countries	44,358	104,466	97,870	363,992	949,968	845,292
Foreign Countries						
United States and Possessions:						
United States	27,994	102,443	148,782	217,338	835,399	1,189,719
Alaska	13	16	152	114	272	474
American Virgin Islands	2	14	5	27	133	112
Guam	.....	26	29	3	143	249
Hawaii	95	642	750	1,176	2,821	3,929
Puerto Rico	25	264	116	280	2,271	1,277
Total United States and Possessions	28,129	103,405	149,834	218,938	841,039	1,195,760
Latin America:						
Argentina	494	1,253	1,874	3,883	25,255	15,148
Bolivia	6	33	101	92	478	826
Brazil	340	2,896	1,646	2,998	21,723	21,260
Chile	44	261	758	487	3,808	3,732
Columbia	135	792	612	980	8,228	6,946
Costa Rica	9	127	120	80	1,635	848
Cuba	244	866	1,143	1,030	6,358	9,227
Ecuador	26	79	202	49	1,380	1,009
Guatemala	18	103	166	99	1,396	1,283
Hayti	7	67	95	107	1,223	1,069
Honduras	12	41	46	134	603	476
Mexico	178	876	1,150	2,021	9,773	12,390
Nicaragua	4	40	121	69	483	553
Panama	18	115	160	257	1,609	2,384
Paraguay	.....	15	11	9	132	354
Peru	49	141	122	737	3,278	2,165
Salvador	8	43	98	39	550	944
San Domingo	12	105	235	274	1,579	1,865
Uruguay	1	85	314	184	2,463	3,423
Venezuela	105	918	2,235	1,039	11,244	13,391
Total Latin America	1,710	8,856	11,209	14,568	103,198	99,293
Europe:						
Albania	.....	.....	31	8	446	71
Austria	.....	16	114	8	1,784	2,770
Belgium	1,846	4,149	2,740	7,871	41,134	26,023
Bulgaria	.....	.....	10	8	14	119

*See Foreign Countries from January 1, 1948.

Canadian Exports, by Countries—*Concluded*

Country	October			January-October		
	1938	1947	1948	1938	1947	1948
FOREIGN COUNTRIES—Con.	(Thousands of Dollars)					
Europe:—Con.						
Czechoslovakia	107	1,113	305	3,092	11,308	10,606
Denmark	298	25	1,182	1,174	2,710	6,046
Estonia	.....	.....	.....	1	.....	.....
Finland	129	94	123	450	972	2,157
France	821	9,928	20,189	7,514	65,760	77,524
Germany	2,869	193	769	14,343	5,828	10,829
Greece	.....	16	80	1,564	4,498	8,659
Hungary	.....	8	77	2	896	763
Iceland	3	226	184	17	2,158	1,661
Italy	110	1,951	6,411	1,427	27,695	28,324
Latvia	36	.....	.....	231	.....	.....
Lithuania	70	.....	.....	848	.....	.....
Netherlands	1,286	4,066	2,339	8,816	49,579	37,451
Norway	1,310	1,325	777	6,429	17,891	15,267
Poland	252	356	777	898	13,281	5,492
Portugal	7	269	196	120	3,232	2,251
Azores and Maderia	1	3	.....	3	313	64
Roumania	3	9	14	38	101	386
Soviet Union	.....	140	.....	794	4,805	105
Spain	4	33	35	99	752	526
Sweden	529	1,498	623	4,102	15,220	6,827
Switzerland	78	1,360	934	631	10,379	15,002
Yugoslavia	1	4	133	8	5,741	1,631
TOTAL EUROPE	9,760	26,782	38,043	60,496	286,497	260,554
Other Foreign Countries:						
Abyssinia	.....	2	.....	.....	87	71
Afghanistan	.....	.....	2	.....	33	41
Belgian Congo	4	134	368	66	1,099	1,716
Burma*	.....	.....	2	.....	.....	125
China	355	2,629	714	2,227	29,107	20,731
Greenland	.....	1	17	.....	78	74
Egypt	37	533	3,519	289	9,263	8,660
French Africa	109	297	180	527	4,226	2,205
French East Indies	3	73	24	20	708	322
French Guiana	1	.....	.....	6	239	129
French Oceania	3	7	1	71	206	54
French West Indies	22	160	4	145	1,589	532
Madagascar	1	6	10	7	81	392
St. Pierre and Miquelon	34	143	106	217	941	1,148
Iraq	1	374	8	37	2,093	721
Tripoli	.....	.....	.....	.....	5	1
Other Italian Africa	.....	.....	.....	.....	7	.....
Japan	3,241	12	709	15,626	516	4,443
Korea	.....	.....	1	.....	22	23
Liberia	1	13	6	17	119	109
Morocco	6	216	157	91	1,266	1,312
Netherlands East Indies	91	474	853	672	4,682	6,123
Netherlands Guiana	2	60	40	30	716	545
Netherlands West Indies	18	141	190	175	1,514	1,796
Iran	30	27	39	68	845	488
Philippine Islands	165	956	1,924	1,185	9,699	6,803
Portuguese Africa	79	185	217	1,261	1,665	2,491
Portuguese Asia	1	76	5	1	144	50
Siam	1	20	118	16	399	508
Canary Islands	.....	.....	4	2	46	6
Spanish Africa	.....	.....	.....	.....	61	53
Syria	9	656	506	54	2,188	1,280
Turkey	.....	57	283	1,916	1,300	1,268
TOTAL OTHER FOREIGN	4,215	7,252	10,007	24,726	74,944	64,220
TOTAL FOREIGN COUNTRIES	43,811	146,294	209,095	318,725	1,305,675	1,619,823
TOTAL DOMESTIC EXPORTS	88,169	250,761	306,964	682,717	2,255,644	2,465,115

*See British Countries prior to 1948.

Clothing Industry of South Africa Important Factor in Economy

Johannesburg and Cape Town leading centres of production —Many small firms produce wide variety of goods— Industry lags in cost accounting and incentive wage schemes —Majority of workers are non-white—Most lines marketed are not branded.

By D. S. Armstrong, Assistant Commercial Secretary for Canada

(Editor's Note—This is the first of two articles on the garment industry in South Africa, prepared for *Foreign Trade*.)

JOHANNESBURG, August 30, 1948.—South Africa's clothing industry, although of recent development, has become such an important factor in the Union's economy that a great deal more attention and consideration is being given to its problems than was formerly the case. Competition from overseas sources, which may conceivably affect the continued progress of the industry, is one of the problems being studied. The manufacture of men's clothing began in 1907 and that of women's clothing as late as 1930. Between 1933 and 1945 the number of manufacturers increased by 22·5 per cent and the number of employees by 41·2 per cent. Today the industry is the third largest section of South Africa's manufacturing industry, comprising 950 separate establishments with over 30,000 employees, an annual wage bill of £6,500,000 and yearly gross value of output of £22,600,000.

The clothing industry, like other industries supplying consumer goods, has followed the world-wide tendency to concentrate near the main centres of consumption. Consequently Johannesburg and Cape Town have the majority of the manufacturers, and Durban and Port Elizabeth are secondary centres. Johannesburg appears to dominate every line of production other than shirts, pyjamas and men's underwear, in which lines Cape Town leads.

The relative importance of the production of various groups of clothing articles is given in the following table:

Gross Value of Output, 1944-45

	£1,000	Percentage
Outer garments, men's and boys'	7,600	33.7
Outer garments, women's and girls	4,328	19.1
Shirts	3,087	13.7
Pyjamas	554	2.4
Underwear, women's and girls'	152	.7
Millinery	631	3.0
Hats, caps and helmets	448	1.9
Waterproof clothing	323	1.4
Ties	203	.9
Other knitted goods	1,935	8.6
Other articles (including men's underwear)	1,357	6.0
Repairs, alterations, etc.	1,934	8.6
Gross value of output	22,552	100.0

Industry Not Specialized

South African clothing manufacturers do not necessarily concentrate on the production of a single line of apparel but rather tend to avoid specializing by making several different types as these are required by the trade. It is the exception rather than the rule for one firm to produce, say,

dresses and no other type of clothing. This is true even in the case of small tailoring or dressmaking establishments, which constitute 54 per cent of the total number of manufacturers but whose production is only 10 per cent of the industry's gross output. These smaller operators sell most of their output direct to the public, whereas the larger firms distribute through normal wholesale and retail channels.

That part of the industry's production known as "Cut, Make and Trim" in South Africa, contributes a fairly considerable volume to the total, although the exact proportion has never been measured. Cut, make and trim work cuts across the two sections in that both larger and smaller manufacturers also undertake this type of work on behalf of other clothing firms and distributive enterprises. In addition some factories engage exclusively in cut, make and trim. The buyers of this type of work usually supply the designs, the main—and sometimes, subsidiary materials.

Small Average Capital of Large Manufacturers

The relative ease of entry into the industry makes it particularly susceptible to competition not only from abroad, but also from local sources. The fact that for the larger manufacturers, the average value of land, buildings, plant and machinery in 1943-44 was £6,249 per establishment, means that comparatively little capital is necessary. As technical conditions present no serious obstacle to the entry of men with small resources, it is inevitable that there should be a high rate of mortality in the industry. Despite this, it is considered that there are fewer withdrawals from the South African industry than in other countries. The highest mortality was in 1935-36 when 25·4 per cent of the existing establishments were classed as "withdrawals". During the war years the percentage was at a minimum, but many marginal firms have been unable to weather the postwar increased competition from abroad.

Industry's Costing System Deficient

One of the greatest weaknesses of the Union's industry is that little in the way of accurate cost accounting has ever been practised. Some manufacturers, therefore, have no idea of the cost of particular operations since no standards of performance or outlays are available for comparison. In 1945 the Office of the Price Controller used the War Emergency Powers to force manufacturers to keep certain specified records so that price control could be more effectively applied. The Board of Trade and Industries, in a recent comprehensive survey of the industry, commented rather fully on this feature and recommended that "the Industry be required . . . to evolve and set in operation a satisfactory costing system". The same report drew attention to the absence of either individual or organized research for the study of production techniques, the collection and circulation of statistics, and the study of market requirements and marketing methods. The only research at present seems to be the study of overseas fashion magazines and publications devoted to the garment trade in other countries.

Employment has Doubled in Thirteen Years

As the clothing industry has expanded, so the number of employees has risen proportionately. In 1932 the number was 14,331 and in 1945 it had increased to 31,017. The greatest expansion has taken place in that section of the industry manufacturing women's clothing. Reliable estimates indicate that there were 1,550 persons engaged in this field in 1939. By 1947 there were 8,300 so employed. The millinery industry would add another 1,700 to this figure.

Since 1932 there have been only two periods when unemployment has been a problem. During 1937-38 there was a slight recession and employment dropped by 500 or about two per cent. In the second quarter of 1947 over 2,500 people in the industry applied for unemployment insurance benefits. The causes for this latter recession were thought to be temporary shortages of raw materials, and a lack of orders which in turn resulted from abnormally large imports during 1946 and the first quarter of 1947. Stability as indicated by employment figures and other statistics of the industry's growth lead one to the conclusion that it is sound and enjoying an increasing measure of success.

High Proportion of Non-white Labour Used

Probably the most noteworthy difference between the clothing industry of the Union and that of other countries is the utilization of non-white labour. There is of course an abundance of such workers in South Africa as indicated by the population ratio of nearly six non-white to one white. In 1945 the racial composition of the labour force employed by the larger manufacturers was as follows:

Racial Composition of the Labour Force

	Male	Female
	Percentage	
Whites	5.0	33.9
Natives	10.6	4.0
Asiatics	5.4	1.4
Mixed races	5.3	34.4

The ratio of male to female labour in the larger establishments is about one to four.

Wage scales and benefits are negotiated under the Industrial Conciliation Act of 1937. There are four Industrial Councils, one for each of the four provinces, and agreements are made periodically for such terms as may be determined by the Minister of Labour. In the opinion of the manufacturers' association, wages and benefits in South Africa compare favourably with those abroad. Typical wage rates applying to specific operatives employed in the Transvaal, where the scale is the highest in the Union, are given below:

Transvaal Garment Industry—Wages per Week*

Class of work	Minimum for beginners	Qualified employee	Period of qualification
Employee engaged on making and/or grading patterns..	$11.20	$56.00	5 years
Male employees (excluding pattern-makers and/or graders, pressers and choppers-out)	11.20	47.60	5 years
Female employees engaged on laying out and/or marking-in of patterns	8.40	28.00	3 years
Pressers (males) and choppers-out (males and females)	11.20	26.60	3 years
Female employees (excluding pattern-makers and/or graders, layers out and/or markers-in of patterns and choppers-out)	8.40	20.30	2½ years

Weekly hours of work—42½
Annual paid leave—three weeks
Number of paid holidays—six.

Incentive Wage Schemes Lacking

There is almost a complete absence of incentive wage schemes in the South African garment industry and those firms which utilize a premium bonus system do so without expert knowledge of the technique required for efficient operation. Employers generally feel that such schemes would

*The approximate conversion rate of $4.00 to South African £1 is used.

promote dissension in the labour unions, but many observers are of the opinion that this attitude is exaggerated. Management is probably reluctant to introduce incentive systems of wages for two reasons, firstly the high initial cost because of the absence of cost standards and time studies and secondly, the day-to-day effort and expense of maintaining the system. Until a standard costing system is developed and adopted throughout the industry it is not likely that incentive wage schemes will become general.

Only a few manufacturers in the Union use the "brand name" type of merchandising and concentrate on exclusive distribution, This minority however includes a small number of firms making both men's and women's clothing whose volume and quality of output and selling methods compare favourably with large factories in other countries. The bulk of the industry sells its output through the traditional distribution chain of wholesaler to retailer to consumer with the assistance of their own travellers or agents. It is well to mention, however, that the distribution channels are as varied as the industry itself.

Tendency to Buy and Sell Direct

There was a tendency during the war years for retailers and manufacturers to short-circuit the wholesale merchants by buying and selling direct. Some reasons for this were (*a*) a better mark-up permitted by the Price Controller, (*b*) availability of cash and thus no necessity for using the credit facilities of the wholesalers, (*c*) retailers were not required to carry the wide variety of stock demanded by the public in normal times.

This tendency has continued into the postwar era, but for different reasons. The growth of the departmental store and of the chain store has had its effect because of centralized bulk buying and because such organizations operate their own wholesale departments. In addition, the return of competition has forced the manufacturers to increase their sales coverage by going direct to the retailer, particularly in the urban area, where the financial risk is not great. Partly as a means of defence, partly by way of expansion, wholesalers have entered the field of manufacturing on the one hand and that of retail distribution on the other. However, the services rendered by the wholesalers as such, are still in demand, and there is no sign of their immediate disappearance. Whereas departmental stores, chain stores and specialized outfitters are comparable in a general sense with similar organizations in Canada, there is nothing to compare with the mail order business which is such an integral part of the distribution system in North America. This is a further reason for the continued prominence of the wholesaler.

Canada and Australia Supply Wheat to India

Imports of food grain into India during the first six months of 1948 have amounted to about 1·75 million tons as against 1·18 million tons in the same period of 1947. As a result of an agreement with Australia, India will get about 100,000 tons of wheat during the period August to October, 1948, in addition to about 670,000 tons which were agreed to under an earlier contract. On September 29, 1948, the Canadian Wheat Board also announced that it had concluded a sale of 300,000 long tons of wheat to India. The shipments are to be made from November, 1948, to July, 1949. It is expected that India will have a domestic production of 5·35 million tons of wheat in 1947-48 as against 4·74 million tons in 1946-47. *(India Commercial News)*

United States Exports of Paint Products Greatly Increased in Past Three Years

Shipments totalled $12,040,000, $20,197,000 and $37,386,000 for 1945, 1946 and 1947 respectively—Ready-mixed paints constitute main item exported—Other products show marked rise in volume and value sold abroad.

By W. D. Wallace, Assistant Commercial Secretary for Canada

(Editor's Note—This is the last of two articles on the paint industry in the United States, prepared for *Foreign Trade*. The first appeared in the November 27th issue.)

WASHINGTON.—While exports from the United States of paint products only averaged 2·6 per cent of total sales in the past three years, they constitute a substantial share of the international paint trade. Shipments totalling $12,040,000, $20,197,000 and $37,386,000 for the years 1945, 1946 and 1947 are substantially over those of prewar years, but it is difficult to give any indication whether or not this trade will continue to increase. The chief factors against further expansion of the export markets are the shortage of United States dollar exchange, increased industrial output of paints by countries that were formerly importers of paints, and the fact that some of the war-torn countries will soon have their paint industries in a position to export.

United States exports of ready-mixed paints, stains and enamels constitute the largest proportion of the total exports of paint products. During the past three years there has been a steady increase in the volume and value of exports. In 1947 they amounted to 7,549,101 gallons at $20,988,448 as compared with 4,893,894 gallons at $10,633,597 in 1946, and 2,888,580 gallons at $5,994,460 in 1945. The chief markets for this group of paints in 1947 have been the Philippine Republic, which received 1,216,576 gallons valued at $2,947,958; Venezuela with 659,892 gallons at $1,877,254; Mexico with 633,546 gallons at $1,797,408; Colombia with 544,068 gallons at $1,563,206; Union of South Africa with 475,448 gallons at $1,321,175; and Canada with 389,256 gallons at $1,076,833. Substantial shipments have been made to Cuba, Brazil, Sweden, Belgium, Turkey, Portugal, China, Curacao, Dominican Republic, Panama, and Costa Rica.

Exports of Pigmented Lacquers Greatly Increased

United States exports of pigmented lacquers are the second largest item in the total exports of paints, varnishes and lacquers, amounting in 1947 to 1,645,928 gallons at $5,234,809, or almost four times the 1945 total of 400,418 gallons at $1,109,335. In 1947, the Union of South Africa was the largest importer, taking 221,933 gallons valued at $645,398. The next largest importer was Brazil with 176,245 gallons at $582,962. Other large markets included Mexico, Argentina, Sweden, Belgium, Colombia, and Venezuela.

In terms of value, the United States exports of varnishes are the third largest item in the total exports of paint products and in 1947 amounted to 1,094,780 gallons at $2,775,640 as compared with 854,741 gallons at $1,671,732 in 1946 and 539,372 gallons at $984,954 in 1945.

Canada is Largest Importer of Varnishes

In each of these years, Canada was the largest importer of varnishes and accounted for an average of 16 per cent by volume and 17 per cent by value of the total United States exports of varnishes in the three-year period. Mexico is second largest importer of varnishes, but in 1947 was surpassed by Cuba. For the three years under review, Mexico accounted for an average

of 13 per cent by volume and value of the total exports of varnishes from the United States. The Philippine Republic has been steadily increasing her purchases of varnishes from the United States and in 1947 they amounted to 97,503 gallons at $174,959.

The South American countries which have obtained substantial supplies of varnish from the United States include Colombia, Venezuela, Brazil and Argentina. Other important markets are Sweden, Belgium, France, Union of South Africa and China.

Bituminous paints rank fourth in terms of value in the United States exports of paint products. In 1947, they were valued at $1,890,254 as against $1,214,022 in 1946, and $954,974 in 1945. Mexico is the principal market, followed by Canada, Philippine Republic, Venezuela, Union of South Africa, and Cuba. Smaller, but important markets, include Belgium, Chile, Brazil, Saudi Arabia, Sweden and the Canal Zone.

Paste and semi-paste colours in oil are in fifth position, and in 1947 amounted to 5,746,984 pounds at $1,619,727, an increase of 2,103,967 pounds over 1945 and 963,461 pounds over 1946. Canada is the chief market for United States exports of paste and semi-paste colours and in the past two years the Philippine Republic has been the second largest market, followed by Mexico. Other important markets include Cuba, Venezuela, Colombia, Brazil, Union of South Africa, Belgian Congo and Sweden.

Shipments of Thinners Nearly Three Times Figure for 1945

Exports of thinners for nitrocellulose lacquers in 1947 amounted to 1,328,272 gallons at $1,562,933, or nearly three times the 1945 total of 561,853 gallons at $592,928. The chief markets are Mexico, Colombia, Philippine Republic, Venezuela, and Brazil. Other foreign countries obtaining thinners from the United States include Cuba, Chile, Argentina, Sweden, Belgium, Union of South Africa and India.

United States exports of clear nitrocellulose lacquers amounted to 407,847 gallons at $1,093,428 in 1947, or more than twice as large as the 1945 total of 170,559 gallons at $374,176. In 1945 and 1946, Canada was the chief market, but in 1947 was surpassed by shipments to Argentina. The next important markets include Mexico, Union of South Africa, Brazil, Colombia, Belgium and Sweden.

Shipments of dry water paints during the past three years have increased in volume and value from 5,492,074 pounds at $475,098 in 1945 to 6,693,820 pounds at $586,247 in 1946 to 9,282,438 pounds at $1,006,269 in 1947. Venezuela is one of the largest export markets for this product and in the past two years has been followed by the Philippine Republic. Other large markets include the Union of South Africa, the West Indies, Panama, Cuba, Canada, Colombia, and Southern Rhodesia.

United States exports of emulsion paints amounted to 407,375 gallons at $710,143 in 1947 as against the 1946 total of 225,539 gallons at $383,462 in 1946 and 228,804 gallons at $544,946. The principal export markets for these paints are Mexico, Venezuela, the Philippine Republic, and Colombia.

Exports of water paints in paste form account for only a very small part of the total United States exports of paint products. In 1947, shipments abroad amounted to 196,971 gallons at $329,062. In 1946, the total was 140,749 gallons at $198,773 and in 1945 they amounted to 131,285 gallons at $180,261. In the past year, the Union of South Africa was the largest market for this product, followed by Venezuela, Colombia, Mexico, Brazil and Canada.

During the past three years, United States exports of white lead in oil have averaged around 1,000,000 pounds per year with an average value of $129,000. In 1947, shipments abroad totalled 859,013 pounds at $176,363.

While the 1947 exports were smaller in quantity than the 1946 total of 959,885 pounds and the 1945 total of 1,075,382 pounds, the value was considerably greater than the 1946 amount of $107,523 and the 1945 total of $104,224. The chief markets are the Philippine Republic, Canal Zone and New Zealand.

Eire Participation in Recovery Program Will Permit Imports from Dollar Areas

Goods valued at $79,000,000 may be purchased in twelve months ended June 30, 1949—Importers are required to justify all proposed dollar expenditures—Canadian exporters should ascertain that necessary authority has been granted before accepting an order.

By H. L. E. Priestman, Commercial Secretary for Canada

DUBLIN, October 1, 1948.—Participation by Eire in the European Recovery Program will provide for the importation of goods valued at $79,000,000 in the twelve months ending June 30, 1949, which is much less than the amount spent in dollar countries in 1947, a total of $136,000,000 having been spent for imports from the United States alone. Only goods of prime necessity may be imported from the dollar area, and importers are required to justify all proposed dollar expenditures. They must also indicate what efforts have been made to obtain the desired commodities from a non-dollar source.

Intending importers in Eire have been instructed to apply not later than October 15, 1948, on the appropriate forms for all dollar imports required to be ordered between October 1, 1948, and March 31, 1949.

Canadian exporters may receive numerous tentative inquiries for the supply of goods, but consummation of the transaction should not take place until the Eire importer has authority to place a definite order, or has established the letter of credit.

Approvals already granted by the Department of Finance will lapse unless the goods are ordered before October 15, 1948, for delivery before March 31, 1949. There is, however, an opportunity of submitting an application for renewal of lapsed approvals.

Importers are warned that ERP assistance will not permit relaxation of Eire's control of dollar expenditure and that dollars available to finance imports will continue to be limited.

It is of interest to Canadian exporters to note that, in view of the documentary evidence required by the United States authorities, in due course all payments for imports of more than $250 in value in future must be made under bankers' credits.

Eire importers are warned that no definite order should be placed for goods originating in the dollar area until the relevant application form has been approved by the Eire Department of Finance. Any breach of this requirement renders an importer liable to heavy penalties. Canadian exporters should ascertain that the Eire importer has the necessary permission to place a definite order for goods from the dollar area. If, however, the order is supported by a suitable bankers' credit, there would appear to be no further inquiry necessary on the part of the Canadian exporter.

Since Eire importers must supply certain commercial documents relating to imports to the Eire authorities, Canadian exporters should be careful on their part to make available the related documents specified by the Eire importers.

Eire Ensures Market for Foodstuffs By New Agreement With Britain

Attractive outlet for Irish livestock in Great Britain guaranteed—Strong demand for cattle on Continent—Trade pact also provides for increased exports of fat sheep and lambs.

By H. L. E. Priestman, Commercial Secretary for Canada

(Editor's Note—This is the second in a series of articles on economic and commercial conditions in Eire, prepared for *Foreign Trade*. The first appeared in the November 27th issue.)

DUBLIN, September 2, 1948.—The system by which the British Ministry of Food had been paying five shillings per hundredweight more for Irish fat cattle finished in Great Britain than for fat cattle finished in Eire was ended by the signing of the Anglo-Irish Trade Pact in June, 1948. This so-called price discrimination had been a sore point with Irish stockbreeders, who had been forced to sell their cattle as stores due to the shortage of feed. This made them feel that they had been unjustly deprived of a share of the profit. The British subsidy now is paid only on cattle raised and fattened in the United Kingdom.

The trade agreement limits the number of fat cattle which may be exported to the United Kingdom to 25 per cent of the total number of cattle exported to that market. It also limits the total number of cattle which Eire may export to the Continent to 50,000 in 1948, and to 10 per cent of her total exports in subsequent years. This guaranteed market in the United Kingdom, together with a strong demand from the Continent, has provided an attractive outlet for Irish livestock. Exports of cattle by Eire for the first six months of 1948 show a drop of approximately 20,000 animals below the same period last year, although the value increased by £600,000.

Irish Cattle Exports

	Quantity January-June		Value (£) January-June	
	1947	1948	1947	1948
Fat cattle	9,390	13,711	£ 372,862	£ 565,788
Stores	151,088	129,691	4,233,320	4,683,991
Milch cows and springers	11,774	8,996	390,593	343,891
Calves	111	12	802	58
Total	172,363	152,410	£4,997,577	£5,593,728

Exports of fat sheep and lambs amounted to 400,000 per annum before the war. In the recent trade agreement, the United Kingdom agreed to accept this number, which is, however, far beyond Eire's capacity to supply at present. Total fat lamb exports in January-June, 1948, were only 7,914 head, as compared with 7,244 head for the same period last year. Bacon, which was formerly an important export from Eire, has vanished from the export list, and production is now insufficient to supply the home market. The government is now making an effort to obtain supplies of feed in the hope of reviving the industry. The Dublin Horse Show this year reflected the vigorous condition of the horse-breeding industry.

A remarkable increase is already perceptible in the number of eggs exported, from 12,214,240 dozen, valued at £1,646,545 for the first half of 1947, to 18,539,220 dozen, worth £3,115,382, for the corresponding period of 1948.

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Total exports of foodstuffs of animal origin (including fish, tinned beef, rabbits, and fresh meat) increased in value from £2,982,115 to £4,957,581. The export value of potatoes (other than seed) more than doubled, from £22,095 for the first six months of 1947 to £45,478 for the first half of this year, but the value of seed potatoes exported fell from £202,376 to £132,451.

Unusually low temperatures which were common to all Europe this year were also experienced in Eire. August was wet and cold, slowing up the ripening and harvesting of crops, and many areas required much hand labour to save their produce.

The Irish farmer is receiving every possible encouragement from the government, and with improved supplies of fertilizers, seed and equipment, Eire should be able to step up her agricultural output to a considerable extent within the next year.

Industrial Investment Activity in Mexico Reflected in Corporation Registrations

Total of 239, with a combined value of 29 million pesos, listed in the first six months of this year—Applications pending for fifty other industrial plants, representing capital investment of 65 million pesos.

By D. S. Cole, Commercial Counsellor for Canada

(Editor's Note—This is the last of two reports on economic conditions in Mexico, prepared for *Foreign Trade*. The first appeared in the November 27th issue.)

MEXICO CITY, October 18, 1948.—Six mining companies, ten food packing plants, twenty-five cotton and rayon textile factories, thirty-four pharmaceutical laboratories and chemical plants, metal manufacturing shops, and oil and fat extraction plants accounted for the bulk of new industrial investment in the first half of this year. A total of 239 new corporations, with a combined value of 29 million pesos, was registered in Mexico City. Increased investment in rayon and food packing was recorded as compared with the same period in 1947, while decreased activity was noted in metals, cotton textiles, chemicals and fats.

Applications are pending for the establishment of fifty other industrial plants, with a combined capital of 65 million pesos, including 23·8 million pesos for meat freezing and packing and 20·1 million pesos for the processing and canning of milk products. These applications are also being studied by the Ministry of Foreign Affairs, which has the authority to recommend important tax concessions for new industries.

The current cotton harvest will yield an estimated 428,000 bales as compared with 485,000 bales which were harvested nine months ago. Unusually large exports of raw cotton at the beginning of this year led to a shortage of fibre in Mexican textile plants, to the extent that cotton textile production by the end of the year will have fallen off by about eight per cent to 50 million kilograms. Domestic sales of cotton textiles have in any case been decreasing, as prices are 40·7 higher than in July, 1947.

Woollen Textile Industry Affected by Peso Devaluation

The woollen textile industry has been seriously affected by the devaluation of the peso, since it consumes a very large proportion of foreign wool, mostly Australian, the prices of which had increased by 70 per cent over

Mexico—Paseo de la Reforma, Mexico City, where the office of the Commercial Counsellor for Canada is located. A total of 239 new corporations, with a combined value of 29 million pesos, was registered in Mexico City in the first six months of this year, giving some indication of the industrial investment activity which is occurring in the country.

a period of twelve months immediately preceding devaluation. Production of woollen textiles in 1943 amounted to 4·2 million kilograms valued at 63·3 million pesos. Production in 1947 was 4·1 million kilograms and 2·1 million kilograms in the first six months of this year. Price increases can be appreciated from the fact that the probable value of production this year will amount to 110·4 million pesos.

The production of cashmeres will reach 2·8 million kilograms this year, as compared with 3·3 millions in 1946. The value of this manufacture was 51 million pesos in 1943, but it will exceed 88 million pesos this year.

Costs of the mining industry are increasing consistently and difficulties are not being solved by the high prices which are being obtained for some metals. Lead prices, for example, are approaching U.S.$17.00 per ton. Revised labour contracts which were signed throughout the industry during June and July added about 40 million pesos to costs in the form of wages.

The production of gold and silver has fallen off this year, together with that of lead and zinc. Copper production has been maintained, but the industry believes that ore and metal values generally will be found to be lower this year than last.

Mexican Metal Production

	Gold	Silver	Copper	Lead	Zinc
	(1,000 kilograms)		(1,000,000 kilograms)		
1946	13.1	1,345.6	61.0	140.1	139.5
1947	14.5	1,830.2	63.4	223.1	195.8
1948 (five months)	4.8	644.2	26.3	67.1	64.1

Complaints by the footwear manufacturing industry have been received with little sympathy by the government and the consuming public, since it

is now clear that established factories can more than satisfy the nation's needs. Prices, however, remain so high that foreign manufacturers are able to compete after paying high import duties.

Mexican shoe factories have capacity for making 25 million pairs of shoes annually. The nation consumes 17 million pairs annually, for, of the total population of 23 million, only 6·8 millions customarily wear leather shoes.

Total investment in the industry is now estimated at $13 million. At a recent congress, the Mexican shoe manufacturers admitted that 90 per cent of the materials now used are produced in the country.

Official statistics give imports of shoes at 260,900 pairs in 1947 and only 98,200 pairs in the first five months of this year. The devaluation of the peso has presented the domestic industry with additional protection of at least 30 per cent, over and above tariff duties which average about 20 per cent ad valorem. It is clear that if and when the prices of Mexican footwear are reduced, the market for imported footwear will shrink very rapidly.

Iron and Steel Industry Affected by High Costs and Labour Unrest

The Mexican iron and steel industry, which is centred in three main plants employing about 8,000 men, faced disaster during June and July because of increasing costs, and strikes or threats of strike for higher wages. The Fundidora de Fierro y Acero in the northern industrial city of Monterey, which employs 4,000 workers and accounts for half the nation's production, was closed for nine weeks by a strike which ended late in September.

Altos Hornos de Mexico, a government financed company, which employs 2,600 workers and produces about 30 per cent of the national total, granted wage increases totalling 5 million pesos annually in March. Iron ore and coke prices have risen and have helped to increase over-all production costs by 100 per cent in the past twelve to eighteen months.

Thirteen minor plants, capable of producing 90,000 tons of steel annually, are operating at 50 per cent of capacity, due to the lack of raw material.

Mexican Iron and Steel Output

Year	Mfg. tons	Finished tons	Value 1,000,000 pesos
1943	192,616	165,462	73.6
1944	193,897	149,976	77.9
1945	386,265	141,262	88.7
1946	533,489	172.014	116.8
1947	659,060	255,063	183.0
1948 (six months)	304,036	123,414	102.2

Bizonal Germany to Stop Imports of Tires

Frankfurt, September 3, 1948.—(FTS)—The import of tires into the British and American areas is expected to cease by November, as increased imports of rubber will enable the local tire industry to cover demand.

Malta to Buy Fish and Lumber from Canada

The Government of Malta has approved import licences for shipments of salmon and spruce from Canada. Other recent imports have been ling from Sweden, evaporated milk from the United Kingdom and New Zealand, and beer from Holland. In addition, the importation of cows is once again being allowed. *(Barclays' Bank Review.)*

Australia Eases Import Licensing For Easy-Currency Countries

With exception of specified commodities, licences will be issued freely for imports from these countries—Canadian goods not affected in change from quota control to administrative control.

By C. M. Croft, Commercial Counsellor for Canada

SYDNEY, November 17, 1948.—Import licensing procedure, outlined on June 7, 1948, was extended on November 8, 1948, to goods having their origin in the following easy-currency countries: Abyssinia, Albania, Austria, Bulgaria, Czechoslovakia, Chile, China, Denmark, Finland, the French franc area, Greece, Hungary, Italy, the Netherlands monetary area, Norway, Peru, Poland, Roumania, Siam, Southern Korea, the Spanish monetary area, Syria, Turkey and Yugoslavia.

The effect of this relaxation in import licensing is that, with the exception of specified commodities, licences will be issued freely for the importation of goods from the above-mentioned countries. A special control will operate over the issue of licences for plain clear sheet glass, newsprint and certain types of paper.

The original announcement indicated that licences would be issued freely, upon satisfactory evidence of availability, for all goods of sterling (other than United Kingdom) origin, which are subject to import licence, and for all goods originating in the French franc area, with certain specified exceptions. These exceptions consisted essentially of alcoholic beverages, manufactured tobacco, cigars and cigarettes, cocoa beans, cocoa butter, linseed, unshelled peanuts, rape seed, cotton seed, castor seed, tea, apparel and attire (including furs), kerosene and other petroleum burning oils, specified petroleum and shale products, castor oil in large containers, cotton seed oil, rapeseed oil, cocoanut oil, perfumes and perfumery, fancy goods, precious stones, jewellery, bags, baskets and the like, smokers' requisites, and antiques. Goods of Indian and Pakistan origin which were excluded from the general easing of import licensing included handkerchiefs, towels and towelling, tablecloths, cotton material for textile manufacture, engine-cleaning waste, canvas and duck, cotton meat wraps, bags and sacks of hessian, jute or calico, cotton yarn and raw cotton. Special controls applied to the licensing of certain kinds of gloves and smoking pipes.

Essentiality Schedule Suspended for Easy-Currency Countries

Before the tightening of licensing of goods of hard-currency origin last year, licences were issued in accordance with a schedule of categories on the basis of the essentiality of the goods. This schedule has now been suspended in so far as the easy-currency countries mentioned above are concerned and also for goods originating in the dollar area, Argentina, Japan and Germany (except the French zone). As to the remaining hard-currency countries, namely, the South American countries outside the dollar area (except Chile and Peru, which are easy-currency countries), Persia, Portugal, Russia and Switzerland, licences will continue to be issued on a "N.Q.R." (No Quota Required) basis for any goods shown in the schedule of categories to be subject to such treatment. Where goods are subject to "quota" control in the schedule, licences will be issued on this

basis only for goods of Swiss origin; licences will no longer be issued on such a basis for any goods originating in other hard-currency countries, and goods which were formerly under quota control, if of Canadian origin, are now regarded as subject to administrative control.

Position of Canadian Goods Not Affected

This in no way affects the position as regards Canadian goods. In some special cases, tentative allocations of dollars have been made to cover the import of key commodities. In all other cases, however, each application is considered on its merits, and import licences are issued or refused consistent with the essentiality of the commodity and its availability in Australia, the sterling area or easy-currency countries. The position can be summed up briefly by saying that an import licence will not be issued for any commodity which is not essential to the economy of Australia, nor for one which is available in soft- or easy-currency countries. Price itself is by no means a determining factor.

Several Canadian exporters have written to their Australian agents and to this office, pointing out that, as sterling or Australian currency can be accepted in payment for exports, there should no longer be any difficulty in securing import licences. As this viewpoint is held by so many firms, it should be pointed out that, regardless of the currency in which a draft covering payment for Canadian goods is drawn, dollars must sooner or later be provided, as sterling or Australian pounds will not be acceptable as payment for wages or materials in Canada. Any import from Canada is regarded as a withdrawal of dollars from the pool and import licences are issued, or, in more practical terms, refused accordingly.

Prospects Good for Oil Seed Crops in Soviet Zone

Frankfurt, September 17, 1948.—(FTS)—In contrast to the last two years, good crops in oil seeds are expected in the Eastern zone for 1948. This year's rapeseed yields are considerably higher than last year, and good crops of poppy seeds and linseed are anticipated. After compulsory deliveries have been made, considerable quantities will be left over for free sale, premiums in oil and bruised grain being provided for such surplus production.

Part of Ocean Freight on Gift Parcels Paid by ECA

Washington, November 27, 1948.—Provision has been made by the Economic Co-operation Administration to defray part of the ocean freight on gift parcels sent from the United States to friends and relatives in countries participating in the European Recovery Program. The regulations provide for:

(*a*) Payments to the Post Office Department, making possible a reduction of four cents a pound for individual relief packages.

(*b*) For the reimbursement of ocean freight charges on shipments made by voluntary non-profit relief agencies.

(*c*) For the reimbursement of ocean freight charges on individual relief packages shipped by freight under a multiple bill of lading.

In order to qualify for these reduced rates, the contents of packages must be limited to non-perishable food, clothing, household goods and medical supplies. While ECA does not finance voluntary relief contributions, it is empowered to pay ocean freight charges on goods shipped by non-profit agencies and by individuals.

Canadian Table and Seed Potatoes Placed Under Export Control

Measure introduced by agreement with United States in effort to ensure continuing market in that country for seed potatoes—Permits will be freely granted for shipments to any country other than United States.

CANADIAN potatoes were placed under export control, effective December 1, 1948, in an effort to ensure a continuing market in the United States for seed potatoes from the 1948 crop. This measure was introduced by agreement with the United States to prevent any flooding of the market in that country and consequent damage to its price support program. Applications for permits will be subject to the following conditions:

(*a*) Permits will be issued freely and without delay for all shipments to any country, other than the United States.

(*b*) Permits will not be granted for shipments of table stock potatoes to the United States.

Canada—Potatoes, loaded in Saint John, awaiting shipment. Thirty-two countries purchased 7,670,000 bushels of table stock potatoes from Canada in 1947 for $8,340,000. A total of 4,257,000 bushels of certified seed potatoes, valued at $6,471,000, were exported in 1947 to sixteen countries.

(*c*) Permits for seed potato shipments to the United States will be issued only if the consignee in that country is a bona fide seed potato buyer, and if the shipment is within the time and area limits of the schedule shown below.

(*d*) On entering into a contract with an American seed potato importer, Canadian exporters will require an assurance from the importer that the potatoes will not be diverted or reconsigned for table stock purposes.

Shippers in Prince Edward Island should make application for export permits to C. E. Shaw, Fruit and Vegetable Division, Department of Agriculture, Charlottetown.

Shippers in New Brunswick should make application for export permits to W. R. Butland, Fruit and Vegetable Division, Department of Agriculture, East Florenceville. Exporters in other parts of Canada should make application for permits to the Export Permit Branch, Department of Trade and Commerce, Ottawa.

Export permits will be freely granted for shipments to the following states: California, Colorado, Minnesota, North Dakota, Oregon, Washington and Wisconsin.

Export permits will be granted for shipments to the following states during the specified periods:

	Opening date of permit	Expiry date of permit
Alabama	—	Feb. 28
Florida	—	Jan. 31
Georgia	—	Feb. 28
South Carolina	—	Feb. 15
North Carolina	—	Feb. 15
Virginia	Jan. 1	Feb. 28
Maryland	Jan. 15	Mar. 31
Delaware	Jan. 15	Mar. 31
New Jersey	Jan. 15	Mar. 31
New York (Long Island)	Feb. 1	Mar. 31
New York (Upstate)	Mar. 1	—
West Virginia	Mar. 1	—
Tennessee	—	Feb. 28
Connecticut	Feb. 15	Mar. 31
Rhode Island	Feb. 15	Mar. 31
Massachusetts	Feb. 15	Mar. 31
New Hampshire	Mar. 15	—
Maine	Mar. 15	—
Pennsylvania	Feb. 1	Apr. 30
Ohio	Mar. 1	—
Indiana	Mar. 1	—
Michigan	Mar. 1	—

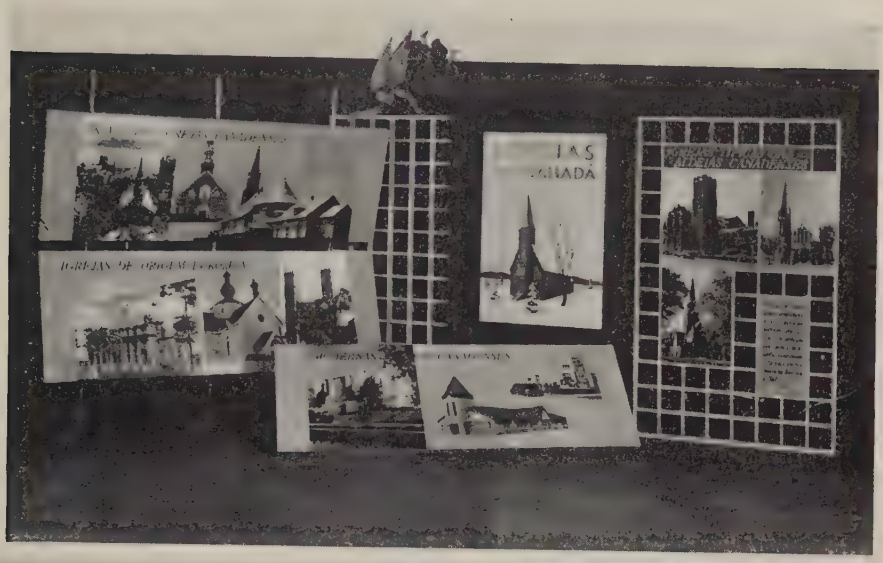
Canada does not normally ship seed potatoes to the following states, but applications for export permits to these states will be considered if they comply with all other requirements:

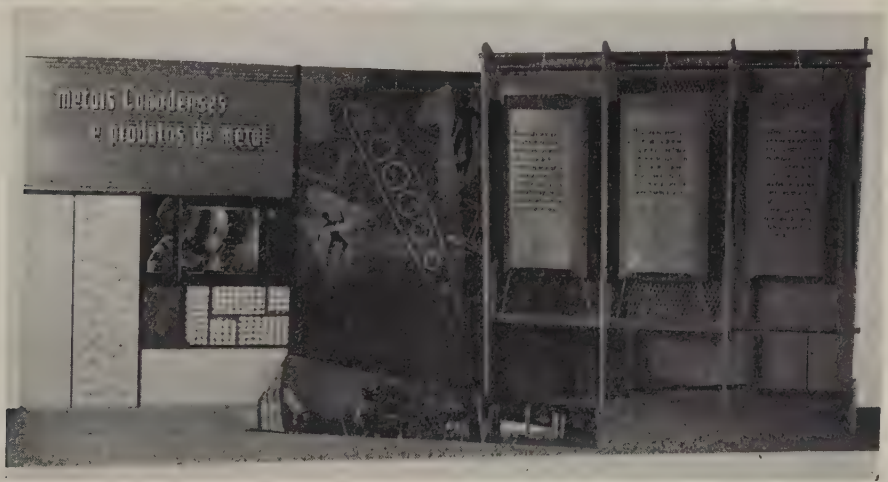
Arizona	Louisiana	Oklahoma
Arkansas	Mississippi	South Dakota
Idaho	Missouri	Texas
Illinois	Montana	Utah
Iowa	Nebraska	Vermont
Kansas	Nevada	Wyoming
Kentucky	New Mexico	

According to recent estimates, the 1948 potato crop will amount to 92,435,000 bushels, which is approximately 18,000,000 bushels in excess of the recent five-year average.

Canadian exports of table potatoes in 1947 were made to thirty-two countries, shipments of 7,670,000 bushels being valued at $8,340,000. Certified seed potato shipments were made to sixteen countries in the same period, exports of 4,257,000 bushels being valued at $6,471,000.

Canadian Window Displays Built in Ottawa for Brazil





Inflationary Trend in India Due Largely to Production Decline

Much purchasing power diverted from higher income groups to the rural sections, which are not particularly interested in development of industry — Farmers disinclined to sell their products for higher prices at present—Great Britain unblocks proportion of sterling balance.

By Richard Grew, Commercial Secretary for Canada

(One rupee equals 30 cents Canadian)

(Editor's Note—This is the first in a series of four reports on the economic situation in India, prepared for *Foreign Trade*.)

NEW DELHI, September 18, 1948.—Suggestions for the control of rising prices and falling production in this country have been sought from bankers, economists, industrialists and labour leaders, as the economic position of India has shown unmistakable signs of deterioration. If these conditions are allowed to continue, they may have the effect of uncontrolled inflation. The inflationary trend has not been accompanied by an expansion of investment, production or employment. The reverse is evident, with the capital market becoming relatively stagnant and production figures declining.

There is some hesitancy, if not a lack of confidence, on the part of the investing public. Frequent and conflicting announcements by officials, possible nationalization and political uncertainties have combined to discourage private enterprise and to cause misgivings for the future. Furthermore, there has been a remarkable shift in the income groups during the past few years, resulting in the diversion of much purchasing power from the higher income groups to the rural sections, which group is not particularly interested in the development of industry. The increased cost of living has also had an adverse effect on the middle classes, which have always been an important section of the investing public. The chief causes for this condition are:

(*a*) Inflation of currency during the war.

(*b*) Deficit budgets on both revenue and capital account in the last few years. In addition to those of the Central Government, deficit budgets have been noted in most of the provinces during the past year.

(*c*) Removals of controls on prices and the distribution of essential goods.

(*d*) An increase in active money, due to the transfer of cash and balances. There have also been large-scale conversions of capital into cash, as a result of the migration arising from the partition of British India.

(*e*) Open market operations of the Reserve Bank, in support of government securities.

(*f*) Pressure of money made in the black market, and of income-evading taxation on prices.

(*g*) Due to the drop in the burden of his obligations and increase in his money income, the farmer is disinclined to sell his products for higher prices.

(*h*) The decline in industrial production, due to technical bottlenecks and transport difficulties, communal and other political disturbances, the uncertainty arising from conflicting pronouncements of policy, and the attitude of labour.

(*i*) Hoarding.

(*j*) The failure of government borrowing and savings campaigns.

(*k*) The support given to rising price trends by an increase in money income.

(*l*) Considerable smuggling between Pakistan and India.

Great Britain Unblocks Sterling

Under the financial agreement between Great Britain and India, provision has been made for the release of £15,000,000 for conversion into any currency. The amount of hard currency to be made available during the second and third years of the agreement will be decided at a later date. When the negotiations took place, India had an unspent balance of £80,000,000. Under the agreement, a further £80,000,000 will be transferred from the blocked account to the operative account, making a total of £160,000,000 available during the next three years.

Agreement was also reached with respect to military stores and installations, as well as pensions. As a result of these transactions, it is estimated that the total amount of blocked sterling balances for the account of India will be reduced to £640,000,000, as compared with £1,305,000,000 for undivided India in April, 1946, by the time the agreement terminates.

Reserve Bank of India Nationalized

The government recently passed legislation to nationalize the Reserve Bank of India, this being the first step in the government's nationalization program. The government will take over the shares held by private investors on payment of suitable compensation, so that it may exercise control over the management, as well as the monetary, financial and economic policies of the institution. The word "sterling" has been substituted in the bill for "foreign exchange", so that the Reserve Bank may hold securities of any country that is a member of the International Monetary Fund, rather than to confine its securities to sterling issues.

There has been some discussion concerning the nationalization of the Imperial Bank of India, which was considered the most suitable to serve the purpose of a state bank, having the most complete banking facilities throughout this Dominion.

Uneasiness is evident in financial circles from several significant occurrences in the flotation of capital issues for new enterprises. As an example, no esthusiasm was displayed in a capital issue for one of the leading industrial concerns in this country that was planning expansion, despite the fact that it was protected from loss by the government, which had a 49 per cent interest in the undertaking. This attitude of the investing public is further emphasized by the fact that the number of applications for consent from the central authorities to commence new enterprises has shown a pronounced decline. In the eleven months ended last May, sanctions granted for new flotations of capital were less than half the amount for the corresponding period last year.

Recent budgets, central and provincial, have provided little cause for optimism and, with one exception, each province anticipates a deficit in the current fiscal year aggregating over Rs.170,000,000. Extraordinary expenditures of a non-recurring nature, involving the placement of refugees

and rehabilitation, have doubtless increased provincial obligations. At the same time, revenues have been curtailed and expenditures increased by various social measures. In this connection, it has been suggested that plans for the establishment of prohibition should be postponed, in order that much-needed revenue may be obtained.

Few Dollars Available for Consumer Goods

India still experiences a shortage of dollars, a situation that will only improve with the betterment of world conditions. This country has important dollar-earning products, such as jute, tea, shellac, mica and oil-seeds. But, due to the shortage of foodstuffs in India, and to the desire to purchase capital equipment for the expansion of domestic industries, there is practically no foreign exchange available for consumer goods. In fact, import restrictions on goods obtainable from dollar areas are probably stricter at present than at any time since the end of the war.

On the other hand, there has been a marked improvement recently in the availability of sterling and soft currencies, including Swiss francs and Swedish kroner. This has resulted in the easing of restrictions on the importation of goods from sterling and soft-currency countries. After almost a year, it was announced last July that certain goods could again be imported under open general licence. This applied, of course, only to the products of sterling and soft-currency countries. Two additional lists have been issued in the last two months.

Pakistan Plans Establishment of Plant for Production of Special Alloy Steels

Central Government will hold controlling interest in company being sponsored by firm in Sheffield, England—Personnel to be trained in Great Britain.

By G. A. Browne, Canadian Government Trade Commissioner

KARACHI, November 15, 1948.—Plans have been made for the establishment of an alloy steel industry in Pakistan, which will likely become one of the supporting pillars of a new, industrialized state. Due to the world shortage of special alloy and high-speed steels, the government has approved plans for the production of this steel in Pakistan.

The project is being promoted by a company with headquarters in Sheffield, England, and the plant is to be established at Wah, in the West Punjab, where hydro-electric power will be available to operate the pilot plant. The cost of this is estimated at $500,000. Besides the melting shop unit, there will be a job foundry, forge department, annealing and pattern shops, and a rolling mill.

The cost of this project will be borne by private investors, the central government and provincial governments, with the Pakistan Government holding 61 per cent of the shares. The Sheffield firm has undertaken to train a number of young Pakistan nationals in their own plant, and an engineer from Pakistan will be charged with the construction of the plant after a period of training in Sheffield.

It is expected that, when production begins, Pakistan will depend to a decreasing extent on imports of special steels for the production at Sialkot of cutlery and surgical instruments, for her machine tool industry and projected ordnance factories.

Canadian Trade with India, Pakistan, Afghanistan, Burma and Ceylon

Imports

Country	Twelve Months Ended September					
	Average 1935-39		1947		1948	
	Value $'000	Per cent	Value $'000	Per cent	Value $'000	Per cent
Afghanistan	[1]	[2]	15	[2]	Nil	.....
Burma	[3]	.....	3	[2]	6	[2]
Ceylon	3,898	31·9	8,788	20·2	12,061	22·9
India	8,321	68·1	34,763	79·8	39,809	75·5
Pakistan	[3]	.....	[3]	.....	838	1·6
TOTAL	12,219	100·0	43,569	100·0	52,714	100·0

Exports

Afghanistan	[1]	[2]	33	0·1	42	0·1
Burma	[3]	.....	676	1·5	275	0·8
Ceylon	210	5·4	3,153	6·9	2,837	8·4
India	3,654	94·6	42,043	91·6	29,084	86·5
Pakistan	[0]	.....	[3]	.....	1,398	4·2
TOTAL	3,864	100·0	45,905	100·0	33,635	100·0

[1] Less than $1,000. [2] Less than one-tenth of one per cent.
[6] Included with India.

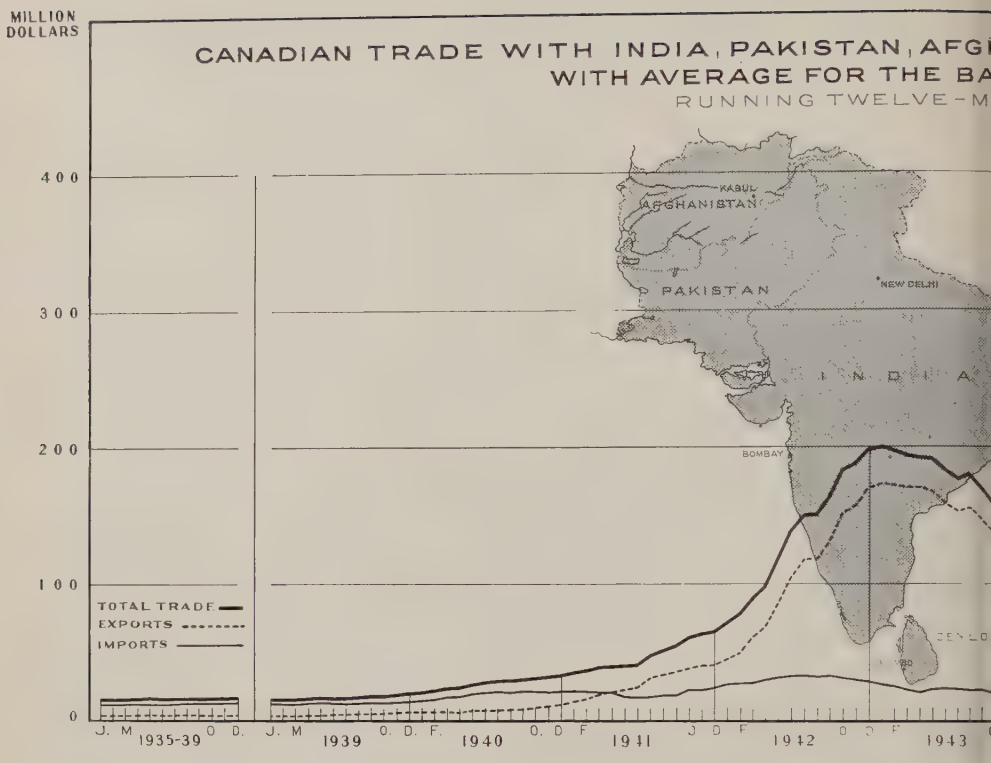
Canadian Trade with Middle East Asia

Imports

Country	Twelve Months Ended September					
	Average 1935-39		1947		1948	
	Value $'000	Per cent	Value $'000	Per cent	Value $'000	Per cent
Aden	4	0·5	Nil	.....	1.412	33·1
Iran	129	16·1	301	5·8	329	7·7
Iraq	313	39·2	1,155	22·2	1,383	32·4
Palestine	68	8·5	148	2·8	35	0·8
Syria and Lebanon	6	0·8	61	1·2	27	0·6
Turkey	279	34·9	3,547	68·1	1,085	25·4
TOTAL	799	100·0	5,212	100·0	4,271	100·0

Exports

Aden	108	11·1	1,163	8·5	1,564	12·4
Iran	100	10·2	879	6·4	578	4·6
Iraq	62	6·3	2,559	18·7	1,153	9·2
Palestine	239	24·5	5,976	43·7	5,543	44·0
Syria and Lebanon	82	8·4	1,565	11·5	1,787	14·2
Turkey	388	39·7	1,525	11·2	1,971	15·6
TOTAL	977	100·0	13,667	100·0	12,596	100·0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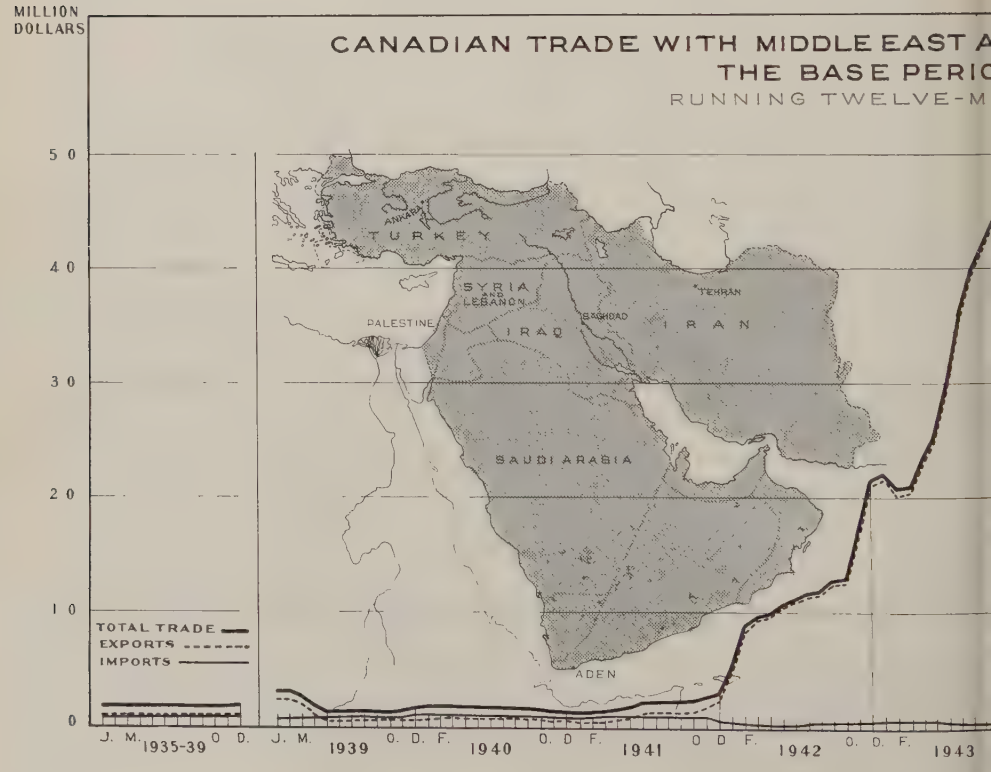
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Prepared by Dominion Bureau of Statistics

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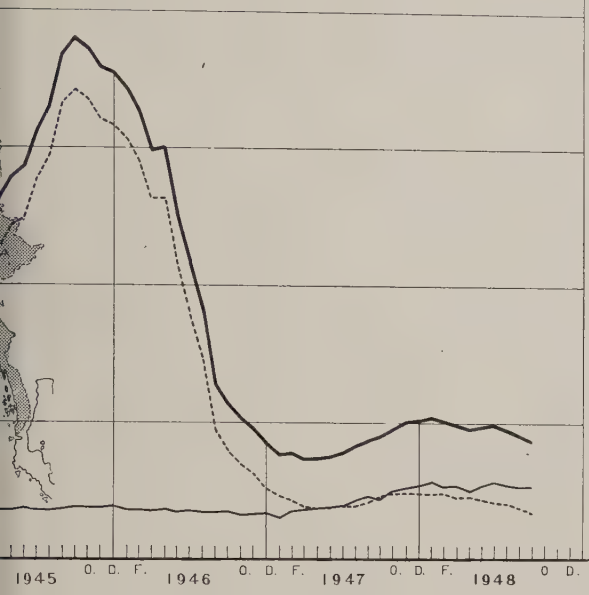

RELATIVE PROPORTIONS OF TRADE
WITH
INDIA, PAKISTAN, AFGHANISTAN,
BURMA AND CEYLON
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AVERAGE FOR THE BASE PERIOD 1935-39
COMPARED WITH
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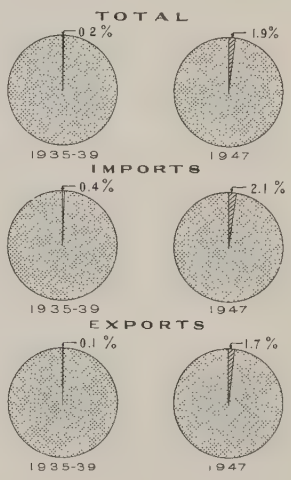

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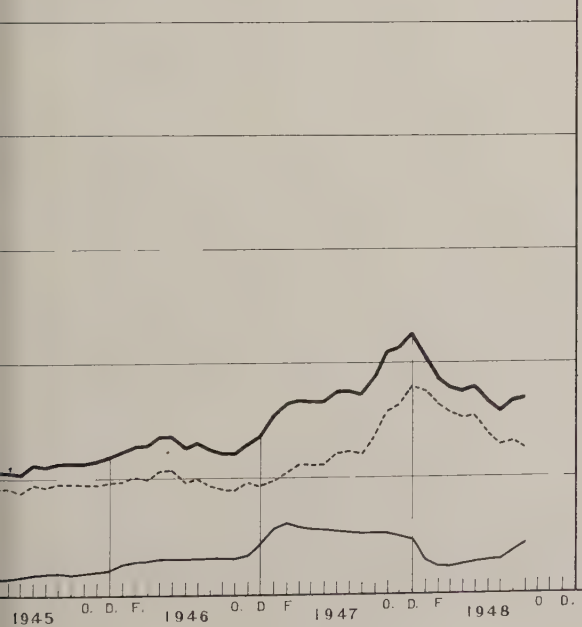
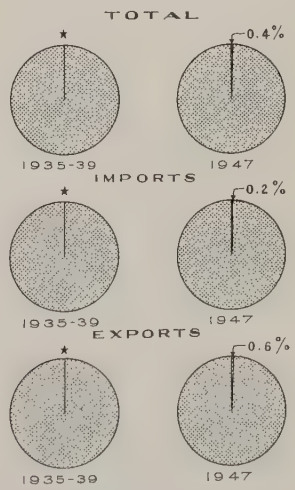


RELATIVE PROPORTIONS OF TRADE
WITH
MIDDLE EAST ASIA
TO
TOTAL CANADIAN TRADE
AVERAGE FOR THE BASE PERIOD 1935-39
COMPARED WITH
LATEST COMPLETED CALENDAR YEAR



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Pakistan Establishes Central Body To Supervise Power Production

Plans for generation of electricity will be co-ordinated—Provinces and states will be assisted in the survey and development of thermal power projects and hydro-electric schemes—Central Engineering Authority will have broad duties and powers.

By G. A. Browne, Acting Canadian Government Trade Commissioner

(Editor's Note—This is the last of two articles on recent planning and industrial development in Pakistan, prepared for *Foreign Trade*. The first appeared in the November 27th issue.)

KARACHI, October 20, 1948.—Power production in Pakistan is receiving the attention of a Central Engineering Authority, which will co-ordinate plans for the generation of electricity. It will also assist the provinces and states in the survey and development of thermal power projects and hydro-electric schemes. This authority will be responsible for the adoption of a uniform policy for the generation, transmission and distribution of electricity, and for the creation of a tariff structure. It will collect and publish statistics on national power resources, and act as a clearing house for information on all matters relating to the availability of power, now and in the future.

The Central Engineering Authority will be responsible for the prevention and control of floods, the prevention of erosion, soil conservation, the reclamation of waterlogged lands by drainage and pumping, and the development of navigational facilities.

Oil is not available in commercial quantities, and the coal resources of Pakistan are limited. It was recommended, therefore, that the highest priority should be given to the development of hydro-electric power. The Industries Conference, meeting last December and again in February, set down a target of 500,000 kw. for the next five to seven years, and indicated what projects would be necessary to meet the short- and long-term needs of the country.

Many Power Projects Under Way or Projected

The Rasul project is under way in the West Punjab, and is expected to produce 14,000 kw. by the end of 1949. The Mianwali, also in the West Punjab, will be developed in three stages, providing ultimately a total of 65,000 kw.

It is to the North West Frontier Province that industry has to look for its immediate needs of hydro power. The capacity of the Malakand station, which stands at 10,000 kw., is to be doubled in the next twelve months by the addition of two 5,000 kw. generators now on order. In another three years, a further 30,000 kw. of hydro power will be available from the Dargai station. In addition, the N.W.F.P. will be in a position to supply 100,000 kw. of power by 1954 from the Warsak scheme to West Punjab.

Turning to East Bengal, the multi-purpose Karnafulli project, which will yield 40,000 kw. and irrigate over 70,000 acres, is likely to mature in five years. The project is under examination by the Central Engineering Authority and will shortly be the subject of study and advice by a firm of consulting engineers.

To survey the present condition of thermal plants scattered throughout Pakistan and make recommendations for their improvement, the government has appointed a firm of consulting engineers who have already begun work in Western Pakistan. When supplies from the Mandi hydro scheme begin to diminish, West Punjab will be able to meet its requirements of electric energy, not only from the N.W.F.P. but also from thermal sets which are now on order in England.

The government has had under consideration provision of additional thermal power, specially in Eastern Pakistan. The Director General of Supply and Development will shortly be calling for tenders for the supply of generating sets varying from 10,000 to 2,000 kw.

Karachi Industrial Trading Estate Formed to Foster Developments

In order to foster various development schemes in the provinces, the Sind Government decided in December, 1947, to sponsor the immediate inauguration of the Karachi Industrial Trading Estate, where intending industrialists could be provided with facilities such as developed land, power, water, roads, railway sidings, postal facilities and telephone services. The total estimated cost of this scheme was Rs.15,000,000 ($4,500,000). This amount was to be raised by a loan, interest charges being met from the rents realized.

The estate is being administered by seven directors, four of whom are government nominees and three elected by an Estate Tenants Association. The present area of the estate available for factory construction is 2,400 acres, with a further 2,645 acres earmarked for future expansion. It is an average of $2\frac{3}{4}$ miles from Karachi, and is directly connected with the main North Western Railway system.

Some of the commodities for which Pakistan was formerly dependent on India are coal, iron and steel and cotton textiles. As Pakistan parted from India, a standstill agreement was adopted whereby India agreed to continue the supply of these controlled commodities on the pre-partition basis. Soon after partition, the flow of these commodities towards Pakistan ceased or diminished. The disruption of trade channels, due to the exodus of non-Muslims from Pakistan, the dislocation of rail transport and India's insistence on payments being made in advance, had much to do with the cessation of supplies.

At one stage, the procurement of these commodities, so essential to the normal life and well-being of the community, became a matter of great anxiety to the government, which had to seek other sources of supply to meet the bare requirements of the people.

Large Supplies of Coal Required

Pakistan's requirements of coal are between three and four million tons per annum. There was almost none received in West Pakistan during August-September, 1947, and although conditions improved in October, there was again a setback in November. Up to the end of December, 1947, the railways ran only skeleton services. From January to June between 130,000 and 152,000 tons a month were received from India.

Under an agreement for the exchange of essential commodities, concluded at Karachi last May, India has undertaken to supply Pakistan with 170,000 tons of coal per month. This agreement came into force on July 1, but Pakistan received only 132,000 tons in July and 123,000 tons in August.

The government is also studying the utilization of coal produced in Pakistan, and the adaption of boilers for the use of coal produced in West Punjab and Baluchistan. Experiments in the use of bitumen as binding material for the manufacture of briquettes have been completed, and it is

expected that two briquetting plants will shortly be ordered, one to be located at Rawalpindi, headquarters of the Attock Oil Company, and the other in Baluchistan.

Under the standstill agreement, Pakistan should have received 2,200.000 bales of cloth and 40,000 bales of yarn from India between August, 1947, and January, 1948. Actual receipts during this period, however, amounted to only 83,600 bales of cloth and 11,456 bales of yarn. This reduction was due to the system for the procurement and distribution of cloth at the various stages breaking down after the partition, and to the fact that provincial governments were unable to finance the purchase of their quota.

By the time arrangements for the procurement of cloth from India were completed and funds arranged, the government of India had begun to press for the supply of cotton by Pakistan before agreeing to release cloth. After protracted negotiations, an agreement was concluded in March, 1948, according to which Pakistan undertook to supply 20 bales of cotton in return for 12 bales of cotton cloth by India. This agreement was to remain in force till the end of August, 1948. Up to last June, Pakistan bought from India 36,000 bales of cloth and yarn, most of which have arrived in Pakistan. Further purchases were made by the Textile Commissioner, and substantial quantities of cloth are expected to arrive in Pakistan shortly.

However, Indian supplies do not half meet the bare requirements of Pakistan, and arrangements have had to be made for importing cloth from other sources. In order to encourage imports from countries other than India, Pakistan has recently ordered the removal of internal control on yarn and cloth so imported. It is expected that Pakistan will import over 5,000 bales of yarn and cloth from other countries. When negotiations for supplies with Japan are concluded, there should be a substantial increase in the level of imports of cloth and yarn. Under the Karachi agreement, Pakistan is entitled to 400,000 bales of cloth and yarn from India between September 1, 1948, and August 31, 1949.

No Deliveries of Steel Made by India in Past Year

From August, 1947, till the end of October, 1948, Pakistan received no steel from India. In accordance with the Karachi agreement, India has undertaken to supply 16,000 tons of steel and 4,000 tons of pig iron per quarter. The total requirements of Pakistan are estimated at 300.000 tons per annum. Some of Pakistan's urgent requirements, such as pipes, baling hoops for cotton, and tinplate have been met by imports from Belgium, Great Britain, and the United States. Efforts to obtain further supplies from these sources, particularly structural steel, are continuing, and it is expected that substantial quantities of steel from Europe and America may be obtained.

In its statement of industrial policy last April, the government stated that only three industries would be owned and operated by the state, namely: Arms and munitions of war, the generation of hydro power, the manufacture of rolling stock and telecommunication equipment.

Apart from these industries, the government has left the entire field to private enterprise, reserving to itself the right, when such enterprise is not forthcoming in adequate measure, to undertake the development of industries of national importance.

Bizonia Plans Large Imports of Tanning Supplies

Frankfurt, September 7, 1948.—(FTS)—Hides, skins, and tanning materials, with a total value of $20,000,000, will be imported by the Bizonal area during the latter half of 1948. These will be used for the mass production of approximately 20,000,000 pairs of shoes of a standardized type.

Canadian Commodity Comments

By Export Division, Foreign Trade Service

Foods and Related Commodities

Casein.—Casein remains in good supply with considerable quantities being shipped to the United States.

Honey.—There is a surplus in Canada of some 14 million pounds of both light and dark honey, part of which is a carryover from last year, the remainder is from this year's crop.

Canned Poultry.—Canned poultry, including chicken spread, remains in good supply.

Soap.—Soap of all types remains under export control, but permits are being granted freely for the shipment of reasonable quantities to any destination.

Eggs.—Due to the United Kingdom contract, export permits for eggs are being confined to Newfoundland, the British West Indies, Alaska and St. Pierre-Miquelon, but permits for these countries are being granted freely. The present United Kingdom contract for eggs expires January 31, 1949, but it is expected that another contract will be negotiated for the ensuing year.

Tobacco.—Production of flue-cured tobacco has declined considerably from an earlier estimate, but apart from the United Kingdom purchase of $7,000,000, there still will be an exportable surplus of some 10 million pounds. This year's average minimum price per pound has been set at 41¼ cents, as compared with last year's price of 36½ cents.

Mutation Mink.—Hitherto Mutation Mink has been available on a limited scale, but with the possibility of obtaining sales in foreign markets, increased quantities will be obtainable in the forthcoming season. For the first time in Canada, major offerings of Mutation Mink will be made by the Canadian Fur Auction Sales, to be held in Montreal next season.

Flaxseed.—Flaxseed is available for shipment to any country and export permits are being granted freely by the Canadian Wheat Board. Flaxseed is presently trading at the support price of $4.00 per bushel on the Winnipeg Grain Exchange.

Rye.—Rye is available for shipment to any country and export permits are granted freely by the Canadian Wheat Board.

Machinery, Metals and Chemicals

Machine Tools.—Machine tool manufacturers are counting on foreign markets for a large percentage of their output. The domestic demand is not sufficient to maintain an economical production in machine tool plants and export markets must be forthcoming if present production is to be maintained.

Mining Equipment.—A variety of equipment, such as hoists, crushers, skips, screens, agitators, etc., is in fair supply, deliveries ranging from three to twelve months, depending on the type required. Diamond-drilling equipment is now in good supply.

Mill Machinery.—Mill machinery, such as rolling mills, foundry equipment, metal drawing equipment, etc., is made on a limited scale, largely in conjunction with United States parent companies. Inquiries for complete plants will be welcomed by large engineering firms or consulting engineers.

Handling Machinery.—Handling machinery such as cranes, conveyors, etc., is in very good supply and made by numerous firms.

Complete Plants for Manufacturing and Processing.—Inquiries for complete plants are welcomed even though all the items of equipment involved may not be made in Canada. Consulting industrial engineers and manufacturers with facilities for processing designs are prepared to undertake the preliminary engineering, including design and specifications, etc., and through associate companies to purchase the plant and equipment, obtaining Canadian-made items wherever possible.

Grain Processing and Baking Machinery.—In good supply.

Logging and Sawmill Machinery.—In fair supply, with deliveries ranging from three to twelve months, depending on the type of equipment. Chain saws are readily available from existing stocks.

Road Machinery.—In fair supply, with deliveries ranging from seven to twelve months, depending on the type of equipment. Small units and attachments may be available in two to six months.

Fruit and Vegetable Machinery.—Fruit and vegetable machinery, such as graders, polishers, dryers, chippers, etc., is made by small firms and on a limited scale.

Rubber Processing Machinery.—Rubber processing machinery and equipment, including compressing, moulding, refining, tire and tube-making, vulcanizing, etc., is made by a few firms and is in fair supply. The range is limited to the fairly heavy and less complicated types.

Fish Processing Machinery.—This is in fair supply from one or two manufacturers with a limited range of production. Deliveries range from three to nine months.

Woodworking Machinery.—Is now in good supply.

Pulp and Paper Machinery.—Is in fair supply, with a wide range of pulp-making machinery but a limited range of paper-making machinery. Deliveries range from nine to twenty months, depending on the type of equipment. Small pulp-making items may be obtained in three to nine months.

Sheetmetal Working Machinery.—Sheetmetal working machinery, such as shears, presses, rolls, etc., is in improved supply and deliveries range from three to eight months, according to type.

Welding Equipment.—Made by one or two firms, but does not include oxy-acetylene and is mainly limited to electric arc welders and to simple spot, seam and butt welding equipment, all in good supply.

Concrete and Cement Machinery.—A wide range of well-designed equipment in good supply.

Petroleum Equipment.—Not made as a standard item for export, but there are possibilities where orders are large and procurement from the United States doubtful, and on certain ancilliaries such as valves, pumps, mixers, separators, etc. Complete process design for oil refining processes can be undertaken in Canada in the form of complete plants for thermo and catalytic cracking, absorption, debutinizing, distillation, isomerization, polymerization, etc. Some equipment for these plants is also available.

Chemical Processing Machinery.—Chemical processing machinery, such as mixers, grinders, separators, crushers, homogenizers, pharmaceutical machinery, is in fair supply.

Plastic Machinery.—Plastic extruders, injection moulding machines and compression moulding presses are now manufactured in Canada. Inquiries are invited.

Brewing Machinery.—Cereal machinery for breweries is produced, and glass-lined tanks and bottling equipment are also available for export.

Brass and bronze fittings for brewery tanks, stainless steel brewery kettles, mash tubs, lauter tubs, hop jacks and horizontal tubular coolers are all manufactured for export. The supply is reasonably good.

Pumps and Valves.—Are in good supply and are made in wide variety by many firms.

Packaging Machinery.—In limited range but of very good quality, is in fair supply, with deliveries ranging from six to eighteen months, depending on the type of equipment.

Canning Machinery.—In limited range, is in fair supply. This includes fish-canning and fruit-canning machinery manufactured by several firms. Delivery ranges from six to eighteen months, depending on the type of equipment.

Bottling Machinery.—Is in fair supply for milk and mineral water bottling, with deliveries ranging from nine to eighteen months.

Laundry and Cleaning (Industrial) Machinery.—This machinery and equipment is manufactured by a number of firms and is now in fair supply for export.

Special Machinery.—Many manufacturers with wartime expanded capacity and experience are looking for business. They will require the designs and full specifications of the machinery or machinery parts required. They will also welcome opportunities to acquire manufacturing rights on standard machines of foreign design.

Cutting Tools.—Capacity in this industry has multiplied several times. Products include milling cutters, taps, dies, drills, lathe tools (especially carbide-tipped tools, widely developed and employed in wartime, which give the best and longest service).

Sales of Farm Implements in Canada.—Approximately 300 manufacturers and importers report total sales of farm implements and equipment amounting to $146,000,000 at retail prices and the sales of repair parts amounting to $30,000,000 at retail prices for the year 1947. Exports of agricultural machinery from Canada amount to approximately $45,000,000. The domestic sales of farm machinery represent an increase of 48 per cent of the estimated sales for 1946 and the sales of repair parts represent an increase of 10 per cent over 1946.

The average mark-up on the domestic sales of implements is shown to be 21½ per cent and on repair parts 31·3 per cent. On a registration basis, the Prairie Provinces account for 61 per cent of all Canadian sales, as compared with 51 per cent in 1946 and 60 per cent in 1945. Dollar value of sales in Manitoba is up 53 per cent, as compared with 1946; in Saskatchewan, 62 per cent; and Alberta, 64 per cent. Increases are recorded of 37 per cent for Ontario, 26 per cent for Quebec and British Columbia, and 14 per cent for the Maritime Provinces.

While the average increase in all types of machinery amounts to approximately 48 per cent, the largest increase was shown in the supplies of tractors and engines, which amounted to an increase of approximately 66 per cent for all of Canada and 78 per cent in the Prairie Provinces. Other above average increases were for haying and harvesting machinery.

It is felt that the 1948 output and sales will greatly exceed the 1947 estimate, and that the export picture in particular will also greatly exceed the $60,000,000 mark. Blanket export permits are being issued to the manufacturers of agricultural machinery, who report that a greater percentage of the output can be devoted to export this year. As previously reported in the *Commodity Newsletter*, some Canadian branches of American plants now have the exclusive rights to manufacture certain types of agricultural machinery, and it is believed that this trend will continue to develop.

India Requires Higher Output of Sugar, Gur, Paper and Cement

Per capita consumption of sugar and gur only 25 pounds per annum, compared with 106 pounds in Great Britain—Diet of 50 pounds considered adequate in India—Production of coal and power should be increased, in opinion of leading industrialist—Raw materials for manufacture of paper available.

By Richard Grew, Commercial Secretary for Canada

(Editor's Note—This is the fourth in a series of articles on a five-year plan for the development of Indian economy. The previous articles appeared in the November 6th, November 13th and November 20th issues. One rupee equals $0.3022 Canadian.)

NEW DELHI, September 9, 1948.—Increased production in the basic industries producing sugar, gur, paper and cement, as well as more coal and power, are immediately required for India, according to a leading industrialist, in a suggested five-year plan for the development of Indian economy.

Considerable attention has been given to increasing the production of sugar and gur, the per capita consumption of this country being only 25 pounds per annum and mostly consisting of gur, compared with 106 pounds, entirely sugar, in the United Kingdom. However, due to climatic conditions, a diet containing 2 to 2·5 ounces of sugar per day is considered adequate, and it is suggested that a target of 50 pounds in terms of sugar and gur, per head yearly, should be attempted. The requirement of 320 million people is 71·5 million tons, as against the present production of 48,500,000 tons. The main problem is to improve the yield of the cane per acre, since the average yield, roughly 15 tons per acre, compares very unfavourably with yields of from 60 to 80 tons per acre, obtained in Java or Cuba. However, it has been established that under scientific cultivation and with full facilities of manure and irrigation, an average yield of between 40 and 45 tons could be achieved throughout the whole country. However, the target of 25 tons per acre is definitely capable of achievement during the next five years, and would make 81 million tons available for consumption. This will produce 8·1 million tons of sugar and gur, thus achieving the target and still permitting the export of about 950,000 tons to Pakistan.

New Sugar Factories Necessary

In order to develop the sugar industry to the required output, the existing smaller factories in the country (with an annual production of 250 and 800 tons) should be extended to 800 tons and 20 new factories should be established with an anticipated production of 200,000 tons.

Prior to the division of the country, the government had already sanctioned the erection of 20 additional units. Two of these, however, were to be situated in what is now Pakistan. In order to meet the production target, another two must be established elsewhere, while a further four units would be required to make up the 40,000 tons at present produced in Pakistan. The present price of a unit complete with machinery, buildings, etc., is about Rs.4,500,000, the cost of 24 new factories therefore amounting to just under Rs.110 million. Adding the cost of extension

India—Canadian newsprint being delivered in Calcutta. The production of newsprint in India has been advocated in a five-year plan for economic development. However, even if the target of 40,000 tons is achieved, it will still be necessary to import approximately 60,000 tons annually.

to existing units, about Rs.30 million, the total investment necessary amounts to Rs.140 million, of which at least 60 per cent will have to be spent abroad. The net addition to the national wealth would amount to Rs.360,000,000.

Paper Production Important to Country's Development

The production of paper, it is considered, should play an important part in the development of the country, as it is the medium by which illiteracy can be overcome.

Some time previously a survey was undertaken to study the future development of this industry and the following estimate of production and consumption for 1951 and 1956 was made:

	1951		1956	
	Consumption	Output	Consumption	Output
	Tons			
Papers of all kinds	280,000	189,000	422,000	352,000
Boards of all kinds	75,000	75,000	119,000	119,000
Total	355,000	264,000	541,000	471,000
Balance to be imported	91,000		70,000	

The above production schedule is believed to be insufficient for the requirements of the country, and it is suggested that efforts should be made to attain the 1956 production by 1952.

With the exception of boards, which do not present as difficult a problem as paper, it is estimated that 352,000 tons would be required within a period of five years. Present production is not more than 87,000 tons and it is considered that a production of 250,000 tons within the

period is the highest that should be attained, leaving 102,000 tons to be imported. The proposed 1952 production schedule, according to varieties, is as follows as well as present production:

Proposed Paper Production Targets for 1952

	Present	1952
	Tons	
White printing	75,000	150,000
Cheap wrappings	....	24,000
Kraft	10,000	20,000
Sand paper	very small	7,000
Grease-proof	....	2,000
Miscellaneous	2,500	7,000
Newsprint	....	40,000
Total	87,500	250,000

The most important directions in which leeway has to be made up are printing and writing papers and newsprint. India has the required raw materials, but newsprint production will be quite a new line and will present some special problems. Even after the country is able to produce 40,000 tons of newsprint from its spruce, fir and other timber, it will need to import about 60,000 tons from other countries. To reach the target for 1952, it will be necessary to import not only newsprint, but 36,000 tons of cheap wrapping paper and a small tonnage of special varieties such as art and chromo papers.

The difference between the present production and the planned production for 1952 is 162,500 tons, and for this increase about 16 additional pulp and paper units, each with a capacity of about 10,000 tons per year, are required. The estimated cost of 16 such units is Rs.14 million each, or Rs.224 million, of which amount roughly Rs.150 million will be spent abroad.

Ample Raw Materials for Paper Believed Available

There are believed to be ample supplies of the raw materials in the country, such as bamboo, grass, bagasse, waste paper, rags, etc., besides timber, such as spruce and fir, for newsprint. The only raw material which has to be imported, though on a fairly small scale, is woodpulp. If the supplies of spruce and fir in the Himalayas are utilized for the manufacture of chemical and mechanical pulps, not only will the problem of newsprint be solved, but some pulp will also be available for the manufacture of special varieties which have to be imported at present. The main chemicals required are soda ash, salt cake, caustic soda, chlorine, lime, rosin and alum. Although all these are made in India at present on a small scale, additional chemical units will have to be installed for increased production of paper and other goods. It is estimated that the additional labour which will be required to achieve this production target will be 24,000 in the factories alone. Reckoning the ex factory price of a ton of paper to be Rs.840, and deducting from this the cost of coal, chemicals, stores, packing, depreciation of plant, etc., it is estimated that Rs.92 million can be added to the national wealth by this increase in production.

Increased Cement Production Essential

Cement is another basic industry which needs immediate expansion, the present production in India, 2,300,000 tons, being barely 50 per cent of the country's immediate requirements. Schemes have been approved for the additional production of 2,455,000 tons, and it is believed that another 200,000 tons will have to be provided in order to meet the total

demand. The necessary materials, limestone, clay, and coal are available, but capital equipment amounting to Rs.280 million will be required, half of which must be spent abroad. An additional 30,000 workers would be absorbed in the industry, and the increase to the national wealth is estimated at Rs.90 million per year.

There is also a considerable range of miscellaneous industries serving capital and consumer goods industries which should be developed, notably non-ferrous metals and plastics. A suggestion has been made for the commencement of a copper refinery and an electrolysis plant with a capacity of 10,000 tons per year. In order to cover the various necessary industries in this miscellaneous category, it is suggested that capital equipment amounting to Rs.500 million should be purchased, about Rs.280 million of which will be spent abroad. A further labour force of 40,000 could be absorbed in these miscellaneous industries, and the increase to the national wealth would be Rs.300 million.

Provision is made for the expenditure of a separate sum of Rs.500 million for the development of cottage industries, excluding gur-making and handloom cloth. Given their correct place in the national economy, it is estimated that a further fulltime labour force of 50,000 could be employed, and that the national wealth could be increased by Rs.500 million during the five-year period.

More Coal Required for Development Plan

All the industries that have been considered, as well as railways and shipping, are partly dependent on coal, and in order that the various suggestions for the development of new, and the expansion of existing industries may be carried out, a scheme for increasing coal production from its present low figure of less than 29 million tons to the estimated consumption of 46·5 million tons per year is proposed.

It is estimated that new and expanded industries, including exports to Pakistan, will require an additional 18,000,000 tons above the present production of about 30,000,000 or slightly less.

The capital investment needed for raising one ton of coal in a representative unit has been estimated as six rupees, besides the cost of land. For 18 million tons, therefore, about Rs.110 million will be needed; roughly two-thirds of this amount will have to be spent abroad on machinery. Development of the mining industry to its highest potential level during the next five years will find employment for an extra 120,000 men and create Rs.220 million in additional wealth per year.

Increased Power Supplies Needed

The development of both agriculture and industry requires that immediate attention should be given to the increase of the supply of power. The hydro-electric capacity at the end of 1946 was 480,400 kw., and to this will be added 1·8 million kw. if the present projects are completed during the next five years. This will be nearly four times the amount of hydro-electric energy at present available throughout the country.

In addition to hydro-electricity, it is considered that not less than two million kw. in terms of thermal energy will be needed. The estimated cost of schemes producing this energy is Rs.500 million, of which Rs.300 million will need to be spent outside the country. If this energy is sold at an average of one anna per unit, the gross income will work out to Rs.330 million, leaving a net addition to the national income of about Rs.200 million after allowing for depreciation and cost of fuel, stores, parts, etc. It is difficult to give a figure for the amount of labour involved, as it will depend on the capacity and distribution of the various units, but it should not be less than 20,000.

Barbados Permits Imports of Drugs and Medicinal Preparations

Port of Spain, November 16, 1948.—(FTS)—The Controller of Supplies, Barbados, has announced that, effective January 1, 1949, qualified importers of drugs and medicinal preparations will be authorized to import from sources outside of the United Kingdom and her colonies any drug and medicinal preparation within the amount of their allocation. The existing practice of allowing the importation of items approved by the Medical and Health Department will be discontinued.

Brazilian Order Will Delay Remittances of Hard Currency

Rio de Janeiro, November 17, 1948.—(FTS)—Effective today, commercial banks will be required to turn over to the Bank of Brazil 75 per cent of all hard currency exchange purchased. It is expected that this measure will result in lengthening the delay in the remittance of hard currency, particularly if this high percentage is maintained for any considerable length of time. It is thought, however, that this may be only a temporary measure to enable the Bank of Brazil to meet heavy commitments coming due at the end of the year and that the former percentage may be restored as soon as the objective has been reached.

British Guiana Permits Imports of Concentrates, Essences and Extracts

Port of Spain, November 18, 1948.—(FTS)—Importers were notified on November 13 that quotas have been established for concentrates, essences and extracts from Canada and the United States for the year 1949, and that applications for import licences will be received immediately for 50 per cent of the quota.

Burma Extends Import Licences

Bombay, November 11, 1948.—(FTS)—The Ministry of Commerce and Supply in Burma has automatically extended to June 30, 1949, all import licences dated September 1, 1948, and onwards. This will assist importers in obtaining their requirements.

Pakistan's Import Control Policy Unchanged

Karachi, November 23, 1948.—(FTS)—The import control policy of Pakistan for the first half of 1949, just announced, shows no change in the licensable list from hard-currency areas. (See *Foreign Trade* June 12, 1948, page 1183 and September 11, 1948, page 526). Applications for import licences must be made by December 31, 1948. Licences issued for July-December, 1948, will be valid for shipment up to June 30, 1949. Licences issued in January-June, 1948, or earlier will not be revalidated, except in the case of capital goods and machinery, the revalidation of which will be considered on the merits of the individual application.

Egyptian Regulations Govern Marking of Textiles

Cairo, November 15, 1948.—Regulations, governing the marking of manufactures imported by Egypt, have been issued in the past few years. Those pertaining to cotton cloth and yarn are as follows:

Cotton cloth—The number of metres or yards, or fractions thereof, must be shown, in characters not less than 6 centimetres high on the front of each length of cotton cloth.

Yarns—The exact length, in metres or yards, or fractions thereof, or the net weight of kilos, or fractions and multiples thereof, must be indicated in characters not smaller in size than any other markings on the thread. For yarns to be used in spinning factories, only the net weight need be shown on the packing.

Denmark's Pig Population Increases

Oslo, November 8, 1948.—(FTS)—Denmark's pig population at the beginning of October was 1,805,000, which represents an increase of 500,000 over the figure in July. It is still only half the prewar population, however. Recent census returns indicate that the number of sows is 221,000, as against 187,000 three months ago.

Mexican Mining Industry Wins Tax Relief

Mexico City, October 28, 1948.—(FTS)—Mexico's oldest and chief industry, mining, was relieved of taxation by two government decrees, published on October 22 and October 27. By making production taxes applicable against a new 15 per cent export tax, the government virtually eliminated the latter, and a second decree halved a 5 per cent supertax on production. The immediate result would be to ensure continuing supplies for the United States at non-inflated prices.

By means of taxes on production, Mexican governments are equal partners with producers in the mining industry, which is largely owned by United States interests. The extent of such production taxes can be estimated from the fact that early this month, lead, now a leading price commodity on the world market, was paying the Mexican Government a total of nearly 55 per cent of its value at the minehead. Production taxes are based on world dollar prices, so that they increased proportionately when the Mexican peso was devaluated in July this year.

A large percentage of exports of leading Mexican metals, lead, zinc and copper are exported to the United States. Exports of lead last year were 223,133 metric tons, of which 121,795 metric tons were bought by the United States. The United States similarly took all the 54,000 tons of copper available for export and 186,177 tons of mined zinc. The 2·5 tons of Mexican gold which were exported last year also went to the United States. Total production was about 14·5 tons and the balance remained in the country. Of silver, 1,830 tons were mined in Mexico last year and 1,298 tons were exported to the United States.

Data for Exporters Compiled

Information, of particular interest to Canadian exporters, concerning shipping documents and customs regulations of foreign countries, is being compiled by the Commercial Relations and Foreign Tariffs Division, Foreign Trade Service. Countries concerning which such information is now available in a revised form are: Denmark, Guatemala, Italy, Mexico, Norway, Sweden and Switzerland. Data on other countries will be made available from time to time.

Industrial Inquiries

Firms in foreign countries consider Canada as a possible market for their products, some of which may be manufactured here for domestic consumption and for export. The following inquiries have been received by the Industrial Development Division, Foreign Trade Service, which is in a position to furnish information concerning the company concerned and its product. In submitting requests for further details, the file number should be quoted.

Saddle Clips for Electrical Conduit and Pipe.—A British firm desires to contact a Canadian manufacturer of electrical fittings, plumbing accessories, or small die castings with the object of entering into arrangements for the production and sale in Canada of saddle clips for use in the installation of electrical conduits or ordinary pipes. (File 5-287.)

Wooden Folding Chair.—A United States firm holding patents in twenty-two countries on a new type of wooden folding chair, for use in private households, meeting houses, schools, hospitals, barracks, concert and lecture halls, desires to contact a Canadian manufacturer with the object of having these chairs produced and sold in Canada under licence or royalty arrangements. (File 25348.)

Memo Pad Holder.—A United States manufacturer has invented and holds both United States and Canadian patents on a new type of memo pad holder which he desires to have produced in Canada under licence or royalty arrangements. It is made from C.R. steel sheets—"crinkle" finish or aluminum sheets—alumilite colour process and polished. (File 5-305.)

Bath Tub.—A United States firm, producing a low cost bath tub manufactured from moulded concrete and finished with lacquers and a coating of plastic, desires to contact a Canadian firm with the object of having these tubs produced in Canada under royalty or licence arrangements. It is stated that these tubs could be produced by almost any firm now manufacturing bricks, tiles, ceramics or other similar materials. (File 5-269.)

Air-cooled Two-stroke Motor.—An Austrian inventor desires to contact a Canadian manufacturer to arrange for the production and distribution in Canada of an air-cooled, two-stroke motor, which he has perfected. This motor could be used for motorcycles, light motor cars, generating electricity, and many other applications, it is claimed. (File 5-99.)

Drought Conditions Affect Crops in Angola

Leopoldville, September 21, 1948.—(FTS)—Angola has experienced prolonged and abnormal dry weather, the effects of which are only now becoming evident. The worst loss will be felt in corn where the harvest is expected to be only half that of last year, which was well below average. Dry conditions, which are rare in the uplands area, have also caused a considerable decline in the production of wheat and rye. Production of coffee will be less than last year and the quality has suffered on account of the lack of moisture. Other crops indicating a smaller harvest include cotton, sugar, beans and various oil-bearing plants. The palm trees have not only yielded a lower production but seed has also suffered. Rice has suffered less than any other commodity.

The drought has also had a serious effect on livestock, due to the condition of pasturage. Some of the cattle are already thin, but the full effect will be felt when harvested feed becomes scarce. There will no doubt be a decline in the dairy and meat industries.

Normally Angola produces agricultural food products in excess of her domestic requirements. This year, however, she faces a serious shortage of certain produce. Lack of adequate elevators or storage space for such crops as grain, rice, beans, etc., and the absence of a thorough agricultural survey are two factors which are held to be contributing to this situation. It is likely that export control of certain agricultural products will be tightened to conserve essential supplies for domestic requirements.

Open Letter to Shippers

Dear Sir:

Commencing with the July 20, 1946, issue of *Foreign Trade*, we have published each week lists of scheduled ocean-going sailings from Halifax, Saint John, Quebec, Montreal, Vancouver and New Westminster. The information contained in this section is furnished by steamship operators and agents, most of whom advertise in the metropolitan newspapers and also advise regular shippers direct of forthcoming departures.

Advantage has been taken by steamship operators and agents of this opportunity to furnish prospective shippers with information concerning their sailings, some even advising the Editor of *Foreign Trade* by telephone or telegraph of last-minute changes in the loading dates of their vessels. As a result, our "transportation section" increased in size to the point where it required almost one-fourth the total number of pages in any one issue.

In an effort to provide our readers with a balanced issue, including more material from our trade commissioners, we have recently eliminated from our "transportation section" the names of ships loading within ten days of the publication date of any issue. This is stated in the introduction.

So that we may determine the value of this section of *Foreign Trade* to shippers, you are requested to indicate whether it is of any real value to your company. If we find the consensus of opinion favours continuation of this service, no substantial change will be made. On the other hand, if sailing lists furnished by steamship companies and agents are considered fully adequate, there would seem to be little object in our devoting so much space in *Foreign Trade* to ocean-going sailing schedules.

Steamship companies and agents are likewise requested to canvass their shippers, and to cite specific cases where this service has been of mutual advantage.

If it is decided to discontinue this section, the equivalent space will be devoted each week to editorial material, including reports from trade commissioners.

As a wide expression of opinion is sought by December 11, 1948, so that any necessary change in our present policy can be made before January 1, 1949, it would be appreciated if replies to this open letter could be prepared forthwith, and mailed to:

The Editor
Foreign Trade
Publicity Division
Department of Trade and Commerce
Ottawa, Ont.

Please quote File No. A-430.

Ocean-Going Sailing Schedules

Information contained in the following list of sailings is furnished by steamship companies and agents concerned. This is the latest available, and is subject to change after *Foreign Trade* has gone to press.

The loading date and name of ship are not indicated in some instances, as information available is not sufficiently definite to mention the ship concerned. The name of the operator is given, however, and exporters should seek further details from the operator or agent concerned. Ships loading within ten days of the publication date of this issue are not included.

Departures from Halifax

*Sails from Saint John about three days earlier.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques	December 20–27	*Yarmouth County*	March Shipping
Africa-South—			
Cape Town, Port Elizabeth, East London, Durban	December 20–27	*Yarmouth County*	March Shipping
Argentina—			
Buenos Aires	December 10–15	*Royal Prince*	Furness Withy
Belgium—			
Antwerp	December 13–18	*Rouen*	Furness Withy
Antwerp	December 15–18	*Vasaholm*	Swedish American
Antwerp	December 17–19	**Beaverdell* (r)	Canadian Pacific
Antwerp	December 20–25	*Pont Audemer*	Furness Withy
Brazil—			
Rio de Janeiro, Santos	December 10–15	*Royal Prince*	Furness Withy
Celebes—			
Macassar	December 20–25	*Marken*	Cunard Donaldson
Colombia—			
Barranquilla	December 14–18	*Polykarp*	Swedish American
Cuba—			
Santiago	December 27–30	*Dufferin Bell*	Pickford and Black
Havana, Santiago	December 18–23	*Tunaholm*	Swedish American
Denmark—			
Copenhagen	December 15–18	*Vasaholm*	Swedish American
Dominican Republic—			
Ciudad Trujillo	December 27–30	*Dufferin Bell*	Pickford and Black
Egypt—			
Alexandria, Port Said, Suez	December 20–25	*Marken*	Cunard Donaldson
Finland—			
Helsinki	December 15–18	*Vasaholm*	Swedish American
France—			
Marseilles	December 18–23	*Capo Arma*	Furness Withy
Marseilles	January 18–24	*Capo Vita*	Furness Withy
Le Havre	December 13–18	*Rouen*	Furness Withy
Le Havre	December 15–18	*Vasaholm*	Swedish American
Le Havre	December 20–25	*Pont Audemer*	Furness Withy
Germany—			
Hamburg, Bremen	December 15–18	*Vasaholm*	Swedish American

Departures from Halifax—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Haiti—			
Port au Prince	December 27–30	*Dufferin Bell*	Pickford and Black
Italy—			
West Coast Ports	December 18–23	*Capo Arma*	Furness Withy
	January 18–24	*Capo Vita*	Furness Withy
Malaya—			
Penang	December 14–18	*Legion Victory*	Isthmian Steamships
Port Swettenham	December 20–25	*Marken*	Cunard Donaldson
Mexico—			
Veracruz	December 18–23	*Tunaholm*	Swedish American
Netherlands East Indies—			
Batavia, Samarang, Soerabaya, Cheribon, Belawan-Deli	December 20–25	*Marken*	Cunard Donaldson
Batavia, Soerabaya	December 14–18	*Legion Victory*	Isthmian Steamships
Netherlands West Indies—			
Curaçao	December 14–18	*Polykarp*	Swedish American
Netherlands—			
Amsterdam, Rotterdam	December 15–18	*Vasaholm*	Swedish American
Newfoundland—			
St. John's	December 2–5	*Blue Cloud*	Montreal Shipping
St. John's	December 4–6	*Wellington Kent*	Newfoundland Canada
St. John's	December 10–13	*Fort Amherst*	Furness Withy
St. John's	December 12–14	*Wellington Kent*	Newfoundland Canada
St. John's	December 13–15	*Island Connector* "	Clarke Steamships
St. John's	December 15–17	*Atlantic Charter*	Montreal Shipping
St. John's	December 16–19	*Fort Townshend*	Furness Withy
St. John's	December 22–26	*Island Connector*	Clarke Steamships
St. John's	January 2–5	*Newfoundland* (r)	Furness Withy
St. John's	January 4–7	*Fort Amherst*	Furness Withy
St. John's	January 21–24	*Nova Scotia*	Furness Withy
Corner Brook	December 8–10	*Mary Sweeney*	Newfoundland Canada
Norway—			
Oslo, Kristiansand, Stavanger, Bergen	December 15–18	*Vasaholm*	Swedish American
Poland—			
Gdynia, Gdansk	December 15–18	*Vasaholm*	Swedish American
Puerto Rico—			
San Juan	December 14–18	*Polykarp*	Swedish American
St. Pierre et Miquelon	December 15–17	*Atlantic Charter*	Montreal Shipping
Singapore	December 14–18	*Legion Victory*	Isthmian Steamships
	December 20–25	*Marken*	Cunard Donaldson
Sweden			
Gothenburg, Malmo, Norrkoping, Stockholm	December 15–18	*Vasaholm*	Swedish American
United Kingdom—			
Bristol, Swansea	December 16–21	*Gloucester City*	Furness Withy

Departures from Halifax—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom —Con			
Liverpool	December 18–21	*Nova Scotia* (r)	Furness Withy
Liverpool	December 21–22	**Empress of Canada* (r)	Canadian Pacific
Liverpool	December 29–30	**Beaverford* (r)	Canadian Pacific
Liverpool	January 2–5	*Newfoundland* (r)	Furness Withy
Liverpool	January 21–24	*Nova Scotia* (r)	Furness Withy
London	December 17–19	**Beaverdell* (r)	Canadian Pacific
London	December 18–22	*Scythia* (r)	Cunard Donaldson
Southampton	December 30	*Aquitania*	Cunard Donaldson
Uruguay—			
Montevideo	December 10–15	*Royal Prince*	Furness Withy
Venezuela—			
La Guaira, Puerto Cabello, Maracaibo	December 14–18	*Polykarp*	Swedish American
West Indies—			
Bermuda	December 16–19	*Fort Amherst*	Furness Withy
Bermuda	December 23–26	*Fort Townshend*	Furness Withy
Bermuda	January 10–13	*Fort Amherst*	Furness Withy
Jamaica	December 16–19	*Fort Amherst*	Furness Withy
Jamaica	December 18–23	*Tunaholm*	Swedish American
Jamaica	December 23–26	*Fort Townshend*	Furness Withy
Jamaica	December 27–33	*Dufferin Bell*	Pickford and Black
Jamaica	December 27	*Canadian Challenger*	Canadian National
Jamaica	January 11	*Canadian Cruiser*	Canadian National
Bahamas	January 25	*Canadian Challenger*	Canadian National
Bahamas	February 8	*Canadian Cruiser*	Canadian National
Antigua, Barbados, Bermuda, British Guiana, Dominica, Grenada, Montserrat, St. Kitts, St. Lucia, St. Vincent, Trinidad	December 8–17	**Lady Rodney* (r)	Canadian National
	December 11–20	*Alcoa Planter*	Alcoa Steamships
	Dec. 25–Jan. 3	*A Ship*	Alcoa Steamships
	Dec. 27–Jan. 3	*Canadian Constructor* (r)	Canadian National
	January 8–17	*A Ship*	Alcoa Steamships
	January 9–17	**Lady Nelson* (r)	Canadian National
	Jan. 25–Feb. 2	**Lady Rodney* (r)	Canadian National
	February 8–16	*Canadian Constructor* (r)	Canadian National

Departures from Saint John

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques	Dec. 30–Jan. 9	*Cabano*	Elder Dempster
Lourenço Marques, Beira	December 13–23	*Fort Grouard*	Elder Dempster
Africa-South—			
Cape Town, Port Elizabeth	December 13–23	*Fort Grouard*	Elder Dempster
East London, Durban	Dec. 30–Jan. 9	*Cabano*	Elder Dempster
Australia—			
Brisbane, Sydney, Melbourne, Adelaide	Late December	*Pipiriki*	Montreal Australia New Zealand Line

Departures from Saint John—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Belgium—			
Antwerp	December 6–15	*Arabia* (r)	Cunard Donaldson
Antwerp	December 20–30	*Beckenham*	Cunard Donaldson
Antwerp	December 21–28	*Westralia*	Montreal Shipping
Antwerp	December 24	*Prins Alexander*	Shipping Limited
Antwerp	January 10	*Hedel*	Shipping Limited
Antwerp	January 20–30	*Beaconsfield*	Cunard Donaldson
British Honduras—			
Belize	December 8	*Wilford*	Saguenay Terminals
Canal Zone—			
Cristobal	December 8	*Wilford*	Saguenay Terminals
Ceylon—			
Colombo	December 20–25	*City of Lille*	McLean Kennedy
Colombo	December 20–30	*Tapti*	McLean Kennedy
Colombia—			
Barranquilla	December 8	*Wilford*	Saguenay Terminals
Barranquilla	December 18	*Benny* (r)	Saguenay Terminals
Barranquilla	December 18–21	*Polykarp*	Swedish American
Barranquilla	January 14	*Sunprince*	Saguenay Terminals
Cuba—			
Havana	December 16–18	*Salen*	Federal Commerce
Santiago Havana	December 24–26	*Tunaholm*	Swedish American
Dominican Republic—			
Ciudad Trujillo	December 8	*Wilford*	Saguenzy Terminals
Ciudad Trujillo	January 14	*Sunprince*	Saguenay Terminals
Eire—			
Dublin	December 21–29	*Ranore Head*	McLean Kennedy
Germany—			
Hamburg	December 20–30	*Beckenham*	Cunard Donaldson
Hamburg	December 21–28	*Westralia*	Montreal Shipping
Hamburg	January 20–30	*Beaconsfield*	Cunard Donaldson
Gibraltar	December 15–23	*Marchport*	Montreal Shipping
Greece—			
Piraeus	December 15–23	*Marchport*	Montreal Shipping
Guatemala—			
Puerto Barrios	December 8	*Wilford*	Saguenay Terminals
Haiti—			
Port au Prince	December 8	*Wilford*	Saguenay Terminals
Port au Prince	January 14	*Sunprince*	Saguenay Terminals
India—			
Karachi Bombay Madras Calcutta	December 20–25 December 20–30	*City of Lille* *Tapti*	McLean Kennedy McLean Kennedy
Chittagong	December 20–25	*City of Lille*	McLean Kennedy
Italy—			
Genoa Naples	January 7–14	*Italo Marsano*	Montreal Shipping
Mediterranean—			
Central and Western Areas	December 15–24 January 7–14	*A Ship* *Italo Marsano*	Montreal Shipping Montreal Shipping
Mexico—			
Tampico Veracruz	December 16–18	*Salen*	Federal Commerce
Veracruz	December 24–26	*Tunaholm*	Swedish American

Departures from Saint John—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Netherlands—			
Rotterdam	December 20–30	*Beckenham*	Cunard Donaldson
	December 24	*Prins Alexander*	Shipping Limited
Amsterdam	January 10	*Hedel*	Shipping Limited
	January 20–30	*Beaconsfield*	Cunard Donaldson
Rotterdam	December 21–28	*Westralia*	Montreal Shipping
Netherlands West Indies—			
Curaçao	December 18	*Benny* (r)	Saguenay Terminals
Curaçao	December 18–21	*Polykarp*	Swedish American
New Zealand—			
Auckland Wellington Lyttleton Dunedin	Mid-January	*Port Quebec*	Montreal Australia New Zealand Line
Northern Ireland—			
Belfast	December 20–28	*Lord Glentoran*	McLean Kennedy
Portugal—			
Lisbon	January 7–14	*Italo Marsano*	Montreal Shipping
Puerto Rico—			
San Juan	December 18–21	*Polykarp*	Swedish American
Trieste	December 15–23	*Marchport*	Montreal Shipping
United Kingdom—			
Avonmouth Swansea	December 10–18	*Norwegian*	Cunard Donaldson
Avonmouth Newport	Dec. 27–Jan. 6	*Delilian* (r)	Cunard Donaldson
Glasgow	December 20–28	*Lismoria*	Cunard Donaldson
Glasgow	Dec. 30–Jan. 9	*Moveria* (r)	Cunard Donaldson
Hull	December 23–28	*Bassano*	McLean Kennedy
Liverpool	December 19–27	*Asia* (r)	Cunard Donaldson
Liverpool	December 20–28	*Lord Glentoran*	McLean Kennedy
Liverpool	December 21–29	*Ramore Head*	McLean Kennedy
Liverpool	January	*Valacia* (r)	Cunard Donaldson
London	December 6–15	*Arabia* (r)	Cunard Donaldson
Manchester	December 15–18	*Manchester Progress* (r)	Furness Withy
Manchester	December 21–24	*Manchester Trader* (r)	Furness Withy
Manchester	December 28–31	*Manchester Port* (r)	Furness Withy
Manchester	January 4–8	*Manchester Shipper* (r)	Furness Withy
Leith Newcastle	December 13–18 Dec. 30–Jan. 4	*Cairnavon* *Cairnesk*	Furness Withy Furness Withy
Venezuela—			
La Guaira Puerto Cabello	January 14	*Sunprince*	Saguenay Terminals
La Guaira Maracaibo	December 18	*Benny* (r)	Saguenay Terminals
La Guaira Puerto Cabello Maracaibo	December 18–21	*Polykarp*	Swedish American
West Indies—			
Jamaica	December 24–26	*Tunaholm*	Swedish American

Departures from Vancouver

Ships listed under "Departure from Vancouver" may possibly be loading in addition at New Westminster. Exporters should communicate with agents in Vancouver to obtain information concerning loading dates, berths, available cargo space and rates.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques...	January 3–20	*Lake Shawnigan*	North Pacific Shipping
Africa South—			
Walvis Bay, Cape Town, Port Elizabeth, East London, Durban	January 3–20	*Lake Shawnigan*	North Pacific Shipping
Argentina—			
Buenos Aires	Early January	*Hindanger*	Empire Shipping
Australia—			
Sydney, Melbourne, Adelaide	December 22	*Stratus*	Empire Shipping
Sydney, Melbourne, Hobart	January 14	*Aorangi*	Canadian Australasian
Brazil—			
Rio de Janeiro, Santos	Early January	*Hindanger*	Empire Shipping
Ceylon—			
Colombo	December	*Höegh Silvercloud*	Dingwall Cotts
China—			
Shanghai	December	*Skauvann*	Canada Shipping
Shanghai	December 13–16	*Vilja*	Empire Shipping
Cook Islands—			
Raratonga	December 15	*Waikawa*	Canadian Australasian
Egypt—			
Alexandria	December 22	*George D. Gratsos*	Empire Shipping
Alexandria	January 11–16	*Lake Minnewanka*	Canada Shipping
Fiji Islands—			
Suva	January 14	*Aorangi*	Canadian Australasian
Greece—			
Piraeus	December 22	*George D. Gratsos*	Empire Shipping
Hawaii—			
Honolulu	January 14	*Aorangi*	Canadian Australasian
Hong Kong	December	*Skauvann*	Canada Shipping
	December 13–16	*Vilja*	Empire Shipping
India—			
Bombay, Calcutta	December	*Höegh Silvercloud*	Dingwall Cotts
Madras, Calcutta	December 12–24	*Lake Lillooet*	North Pacific
Italy—			
Genoa	December 22	*George D. Gratsos*	Empire Shipping
Lebanon—			
Beirut	December 22	*George D. Gratsos*	Empire Shipping
New Zealand—			
Lyttleton	December 15	*Waikawa*	Canadian Australasian
Auckland	January 14	*Aorangi*	Canadian Australasian

Departures from Vancouver—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Peru—			
Callao	Early January	*Hindanger*	Empire Shipping
Philippines—			
Manila	December	*Skauvann*	Canada Shipping
Cebu	December	*Höegh Silvercloud*	Dingwall Cotts
	December 13–16	*Vilja*	Empire Shipping
Society Islands—			
Papeete	December 15	*Waikawa*	Canadian Australasian
United Kingdom—			
Liverpool	December	*Parthenia*	Balfour Guthrie
Glasgow			
London	Nov. 28–Dec. 13	*Lake Athabasca*	Anglo Canadian
Unstated Ports	Dec. 15–Jan. 2	*Lake Cowichan*	Empire Shipping
	January 6–21	*Lake Kootenay*	Empire Shipping
	Jan. 18–Feb. 4	*Lake Kamloops*	Anglo Canadian
	Dec. 22–Jan. 8	*Lake Babine*	Anglo Canadian
	Jan. 26–Feb. 10	*Lake Chilliwack*	Anglo Canadian
Uruguay—			
Montevideo	Early January	*Hindanger*	Empire Shipping

Tobacco Growers' Society Suspends Operations

The Turkish Tobacco Growers' Society of Southern Rhodesia suspended operations last September, as the levy on the crop was not sufficient to cover the cost of maintaining the organization. Owing to large quantities of Turkish tobacco reported unsold in the Middle East, the society did not recommend any expansion of the crop for the present. *(Barclays' Bank Review)*

Patents and Trade Marks Issued for Belgian Congo

Leopoldville, October 5, 1948.—(FTS)—Patents totalling 125 were issued for the Belgian Congo in 1947. Of these only ten were deposited in the Patent Office in the Colony, the balance being registered in Brussels. In the same period, 345 trade marks, designs and industrial models were recorded, of which 85 were registered in the Colony.

Canadian Tourists May Visit Western Germany

Frankfurt, November 11, 1948.—(FTS)—Canadian tourists wishing to visit Western Germany (Bavaria) may secure a military entry permit on application to Thomas Cook & Son, the American Express Company, Pan American Airways or the American Overseas Airways Corporation. Trans-Canada Air Lines and other tourist agencies may also be authorized to accept prepaid accommodations, though delays may be involved through the necessity for securing a permit from the Military Permit Officer, Civil Affairs Division, War Department, in Washington. Intending tourists must present evidence of prepaid accommodation to the Military Entry Permit Office.

(Editor's Note—Lists of licensed hotels in Bavaria, Wuerttemberg-Baden and Hesse, and of licensed restaurants in Bavaria are on file (13072) in the Department of Trade and Commerce, Ottawa, from which further information may be obtained. Daily rates, including meals, at the licensed hotels, vary upwards from $7.50.)

Foreign Trade Service Abroad

Cable address:—*Canadian*, unless otherwise shown.

Note.—Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

Argentina

Buenos Aires—H. L. Brown, Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.

Territory includes Uruguay and Paraguay.

Buenos Aires—W. B. McCullough, Commercial Secretary (Agricultural Specialist), Canadian Embassy, Bartolomé Mitre, 478.

Australia

Sydney—C. M. Croft, Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.

Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

Melbourne—F. W. Fraser, Commercial Secretary for Canada, 83 William Street.

Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Belgian Congo

Leopoldville—L. H. Ausman, Canadian Government Trade Commissioner, Forescom Building. Address for letters: Boîte Postale 373.

Territory includes Angola and French Equatorial Africa.

Belgium

Brussels—B. A. Macdonald, Commercial Secretary, Canadian Embassy, 46 rue Montoyer.

Brazil

Rio de Janeiro—Maurice Bélanger, Commercial Secretary, Canadian Embassy, Ed. Metropòle, Avenida Presidente Wilson 165. Address for letters: Caixa Postal 2164.

São Paulo—J. C. Depocas, Canadian Government Trade Commissioner, Canadian Consulate, Edificio Alois, Rua 7 de Abril 252. Address for letters: Caixa Postal 6034.

Chile

Santiago—E. H. Maguire, Acting Commercial Secretary, Canadian Embassy, Bank of London and South American Building. Address for letters: Casilla 771.

Territory includes Bolivia.

China

Shanghai—L. M. Cosgrave, Commercial Counsellor for Canada, 27 The Bund. Postal District (0).

Colombia

Bogotá—H. W. Richardson, Acting Canadian Government Trade Commissioner, Edificio Colombiana de Seguros. Address for letters: Apartado 1618. Address for air mail: Apartado Aereo 3562.

Territory includes Republic of Panama and the Canal Zone.

Cuba

Havana—Office of the Commercial Secretary, Canadian Legation, Avenida de las Misiones 17. Address for letters: Apartado 1945.

Territory includes Haiti, Dominican Republic and Puerto Rico.

Egypt

Cairo—J. M. Boyer, Canadian Government Trade Commissioner, 22 Sharia Kasr el Nil. Address for letters: Post Office Box 1770.

Territory includes the Sudan, Palestine, Cyprus, Iraq, Syria and Iran.

France

Paris—J. P. Manion, Commercial Secretary, Canadian Embassy, 3 rue Scribe.

Territory includes Algeria. French Morocco and Tunisia.

Paris—J. H. Tremblay, Commercial Secretary (Agricultural Specialist), Canadian Embassy, 3 rue Scribe.

Territory includes Belgium, Denmark, France and the Netherlands.

Germany

Frankfurt—B. J. Bachand, Canadian Economic Representative, Canadian Consulate, Economic Section, 145 Fuerstenbergerstrasse, Frankfurt am Main, A.P.O. 757, U.S. Army.

Cable address, Canadian Frankfurt/Main.

Greece

Athens—T. J. Monty, Commercial Secretary, Canadian Embassy, 31 Vassilissis Sophias Avenue.

Guatemala

Guatemala City—C. B. Birkett, Canadian Government Trade Commissioner, Post Office Box 400.

Territory includes Costa Rica, El Salvador, Honduras and Nicaragua.

Hong Kong

Hong Kong—K. F. Noble, Canadian Government Trade Commissioner, Hong Kong Bank Building. Address for letters: Post Office Box 126.

Territory includes South China, the Philippine Islands and French Indo-China.

India

New Delhi—Richard Grew, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 114.

Bombay—C. R. Gallow, Commercial Secretary for Canada, Gresham Assurance House, Mint Road. Address for letters: Post Office Box 886.

Territory includes Burma and Ceylon.

Ireland

Dublin—H. L. E. Priestman, Commercial Secretary for Canada, 66 Upper O'Connell Street.

Belfast—H. L. E. Priestman, Canadian Government Trade Commissioner, 36 Victoria Square.

Italy

Rome—R. G. C. Smith, Commercial Secretary, Canadian Embassy, Via Saverio Mercadante 15-17.

Territory includes Malta, Yugoslavia and Libya.

Jamaica

Kingston—R. V. N. Gordon, Acting Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.

Territory includes the Bahamas and British Honduras.

Mexico

Mexico City—D. S. Cole, Commercial Counsellor, Canadian Embassy, Edificio Internacional, Paseo de la Reforma. Address for letters: Apartado Num. 126-Bis.

Netherlands

The Hague—J. A. Langley, Commercial Counsellor, Canadian Embassy, Sophialaan 1-A.

Newfoundland

St. John's—R. Campbell Smith, Commercial Secretary, Office of the High Commissioner for Canada, Circular Road.

New Zealand

Wellington—P. V. McLane, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 1660.

Territory includes Fiji and Western Samoa.

Wellington—Dr. W. C. Hopper, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Post Office Box 1660.

Norway

Oslo—S. G. MacDonald, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.

Territory includes Denmark and Greenland.

Pakistan

Karachi—R. K. Thomson, Acting Canadian Government Trade Commissioner, The Cotton Exchange, McLeod Road. Address for letters: Post Office Box 531.

Territory includes Afghanistan.

Peru

Lima—C. J. Van Tighem, Commercial Secretary, Canadian Embassy, Edificio Boza, Carabaya 831, Plaza San Martin. Address for letters: Casilla 1212.

Territory includes Ecuador.

Portugal

Lisbon—L. S. Glass, Canadian Government Trade Commissioner, Canadian Consulate General, Rua Rodrigo da Fonseca 103.

Territory includes the Azores and Madeira, Spain, Spanish Morocco, the Canary Islands and Gibraltar.

Singapore

Singapore—Paul Sykes, Canadian Government Trade Commissioner, Room D-2, Union Building. Address for letters: Post Office Box 845.

Territory includes Federation of Malaya, North Borneo, Brunei, Sarawak, Siam and Netherlands East Indies.

South Africa

Johannesburg—S. V. Allen, Commercial Secretary for Canada, Mutual Building, Harrison Street. Address for letters: Post Office Box 715.

Territory includes Transvaal, Natal, Southern Rhodesia, Northern Rhodesia, Mozambique or Portuguese East Africa, Kenya, Nyasaland, Tanganyika and Uganda.

Cable address, Cantracom.

Cape Town—S. G. TREGASKES, Acting Commercial Secretary for Canada, New South African Mutual Buildings, 21 Parliament Street. Address for letters: Post Office Box 683.

Territory includes Cape Province, Orange Free State, South-West Africa, Mauritius and Madagascar.

Cable address, Cantracom.

Sweden

Stockholm—F. H. PALMER, Commercial Counsellor, Canadian Legation, Strandvägen 7-C. Address for letters: Post Office Box 14042.

Territory includes Finland.

Switzerland

Berne—YVES LAMONTAGNE, Commercial Counsellor, Canadian Legation, Thunstrasse 95.

Territory includes Austria, Czechoslovakia and Hungary.

Trinidad

Port-of-Spain—A. W. EVANS, Acting Canadian Government Trade Commissioner, Colonial Life Insurance Building. Address for letters: Post Office Box 125.

Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

Turkey

Ankara—G. F. G. HUGHES, Acting Commercial Secretary, Canadian Embassy, 211 Ayranci Baclari, Kavaklidere.

United Kingdom

London—A. E. BRYAN, Commercial Counsellor, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Sleighing, London.

London—R. P. BOWER, Commercial Secretary, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Territory includes the South of England, East Anglia and British West Africa (Gold Coast, Sierra Leone and Nigeria).

Cable address, Sleighing, London.

London—W. B. GORNALL, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Cantracom, London.

London—R. D. ROE, Commercial Secretary (Timber Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Timcom, London.

Liverpool—M. J. VECHSLER, Canadian Government Trade Commissioner, Martins Bank Building, Water Street.

Territory includes the Midlands, North of England and Wales.

Glasgow—J. L. MUTTER, Canadian Government Trade Commissioner, 200 St. Vincent Street.

Territory covers Scotland and Iceland.

Cable address, Cantracom.

United States

Washington—J. H. ENGLISH, Commercial Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

Washington—G. R. PATERSON, Agricultural Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

New York City—M. T. STEWART, Canadian Government Trade Commissioner, British Empire Building, Rockefeller Centre.

Territory includes Bermuda.

Cable address, Cantracom.

Detroit—J. H. HURLEY, Consul of Canada, Canadian Consulate, 1035 Penobscot Building, Detroit, 26, Michigan.

Chicago—EDMOND TURCOTTE, Consul-General of Canada, Suite 800, Chicago Daily News Building, 400 West Madison Street.

Los Angeles—V. E. DUCLOS, Canadian Government Trade Commissioner, Associated Realty Building, 510 West Sixth Street.

San Francisco—HARRY A. SCOTT, Consul-General of Canada, 3rd floor, Kohl Building, 400 Montgomery Street, San Francisco.

Venezuela

Caracas—J. A. STILES, Acting Canadian Government Trade Commissioner. Address for letters: Canadian Consulate General, 8° Piso, Edificio America, Esq. Veroes.

Territory includes Netherlands West Indies.

Foreign Exchange Quotations

The following are nominal quotations, based on rates available in London or New York and converted into Canadian terms at the mid-rate for sterling or par for United States dollars, as furnished by the Foreign Exchange Division of the Bank of Canada. These quotations may be found useful in considering statistics and prices generally, but Canadian exporters are reminded that the kinds of currency which may be accepted for exports to different countries are specifically covered by the Foreign Exchange Control Act and Regulations, and that funds may sometimes be tendered in payment for exports, which cannot, in fact, be transferred to Canada. Both importers and exporters are advised to communicate with their bankers before completing financial arrangements for the sale or purchase of commodities, to ensure that the method of payment contemplated is not only possible but that it is in accordance with the Foreign Exchange Control Act and Regulations.

Country	Monetary Unit		Nominal Quotations Nov. 23	Nominal Quotations Nov. 29
Argentina	Peso	Off.	·2977	·2977
		Free	·2080	·2080
Australia	Pound	....	3·2240	3·2240
Belgium and Belgian Congo	Franc	....	·0228	·0228
Bolivia	Boliviano	....	·0238	·0238
British West Indies (except Jamaica)	Dollar	....	·8396	·8396
Brazil	Cruzerio	....	·0544	·0544
Chile	Peso	Off.	·0517	·0517
		Export	·0322	·0322
Colombia	Peso	....	·5714	·5714
Cuba	Peso	....	1·0000	1·0000
Czechoslovakia	Koruna	....	·0200	·0200
Denmark	Krone	....	·2083	·2083
Ecuador	Sucre	....	·0740	·0740
Egypt	Pound	....	4·1330	4·1330
Eire	Pound	....	4·0300	4·0300
Fiji	Pound	....	3·6306	3·6306
Finland	Markka	....	·0073	·0073
France and French North Africa	Franc	Off.	·0038	·0038
		Free	·0032	·0032
French Empire—African	Franc	....	·0076	·0076
French Pacific Possessions	Franc	....	·0202	·0202
Haiti	Gourde	....	·2000	·2000
Hong Kong	Dollar	....	·2518	·2518
Iceland	Krona	....	·1541	·1541
India	Rupee	....	·3022	·3022
Iraq	Dinar	....	4·0300	4·0300
Italy	Lira	....	·0017	·0017
Jamaica	Pound	....	4·0300	4·0300
Malaya	Dollar	....	·4701	·4701
Mexico	Peso	....	.....	.....
Netherlands	Florin	....	·3769	·3769
Netherlands East Indies	Florin	....	·3769	·3769
Netherlands West Indies	Florin	....	·5302	·5302
New Zealand	Pound	....	4·0300	4·0300
Norway	Krone	....	·2015	·2015
Pakistan	Rupee	....	·3022	·3022
Palestine	Pound	....	4·0300	4·0300
Peru	Sol	....	·1538	·1538
Philippines	Peso	....	·5000	·5000
Portugal	Escudo	....	·0403	·0403
Siam	Baht	....	·1000	·1000
Spain	Peseta	....	·0916	·0916
Sweden	Krona	....	·2783	·2783
Switzerland	Franc	....	·2336	·2336
Turkey	Lira	....	·3571	·3571
Union of South Africa	Pound	....	4·0300	4·0300
United Kingdom	Pound	....	4·0300	4·0300
United States	Dollar	....	1·0000	1·0000
Uruguay	Peso	Controlled	·6583	·6583
		Uncontrolled	·5618	·5618
Venezuela	Bolivar	....	·2985	·2985